

Stephanie Hofmann & Bobby Neuhold

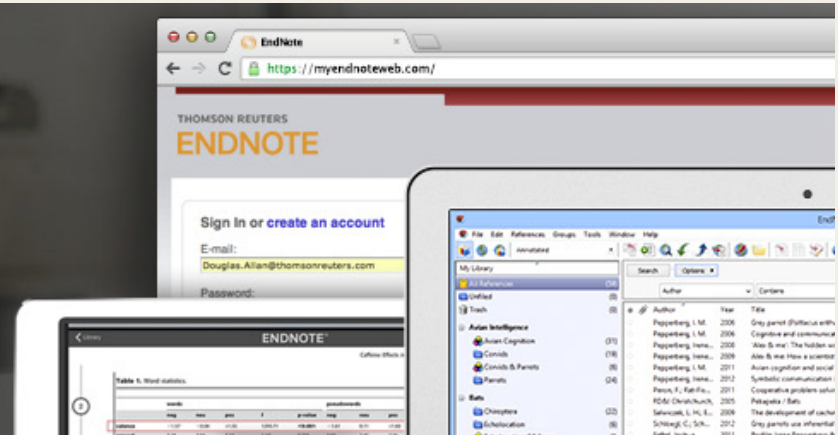
contact: info@lib4ri.ch



Literature Management with Endnote

**Find, use and share
research with EndNote**

It's for more than bibliographies. Sync your
EndNote library across your desktop, iPad and
online. Work on your research from anywhere.



* Screenshot www.endnote.com

Stephanie Hofmann & Bobby Neuhold

contact: info@lib4ri.ch

Welcome

Lib4RI Training Series

- Module 1
Searching Scientific Information
- Module 2
The Publication Process
- **Module 3**
Literature Management with Endnote

LIB4RI TRAINING SERIES

Searching & Managing Scientific Information

Lib4RI's introductory course for PhD students
and other affiliates of Eawag, Empa, PSI and WSL



MODULES

- 1 – Searching Scientific Information
- 2 – The Publication Process
- 3 – Literature Management

COURSE SITES

Eawag: Dübendorf
Empa: Dübendorf
PSI: Villigen
WSL: Birmensdorf

Online registration: www.lib4ri.ch/services/trainings.html

Module 3 – Literature Management with Endnote

9.00 – 9.15 **Introduction to Literature Management**


9.15 – 10.30 **Endnote**
Presentation & Live Session (Part 1)

10.30 – 10.45 Break

10.45 – 12.00 **Endnote**
Presentation & Live Session (Part 2)

Thanks for your feedback

Help us improve our training by returning the feedback form enclosed in your documentation!

Lib4RI 
Library for the Researcher in the Life Sciences
Health Sciences, Long, Leips, PDS & WSL

Course Evaluation
Lib4RI Training Series: Searching & Managing Scientific Information
Module 3: Literature Management with Endnote
Organisation: ☐ Eawag ☐ Empa ☐ PSI ☐ WSL
Session date: _____

Please rate the following statements...

	strongly agree	agree	neutral	disagree	strongly disagree
1 Content					
a) Overall, the course fully met my expectations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) The knowledge provided is useful for my work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) The level of difficulty and the comprehensibility of the presentations were appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) There was a good balance between the course length and subject matter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Examples/exercises were appropriate and complemented the course content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2 Which topics could be shortened or excluded?

.....

.....

3 Which topics were missing or should have been presented in more detail?

.....

.....

Please rate the following statements...

	strongly agree	agree	neutral	disagree	strongly disagree
4 Presentation and Organisation					
a) The course was well structured and had a clear theme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) The group size was appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) The documents distributed are useful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) The duration of the course and use of time were appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) The course announcement and the information given were clear and correct	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5 What did you like most?

.....

.....

6 What could be improved?

.....

.....

Content				Presentation			
group	sufficient	insufficient	incomprehensible	very good	good	sufficient	insufficient
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Why Literature Management & Software?

Literature / Information Sources

- Books & book chapters
- Articles in journals & newspapers
- Conference proceedings
- Web pages
- Databases
- Software
- Images, audio & video, ...



by Meghan Dougherty,
www.flickr.com,
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Managing

- File, organise & update references (author, title, year ...) and corresponding media (articles, books, ...)
- Aim: a personal library for quick information retrieval & usage

Advantages of dedicated software

- Import, edit, organise, sort and retrieve metadata & media
- Access library via
 - Desktop & Laptop
 - Web
 - Smartphone & tablet
- Share content with colleagues
- Use library for the writing of reports, articles, theses
 - cite references in your text
 - generate bibliographies
 - select / change output styles according to the requirements

Reference Management Software – Features

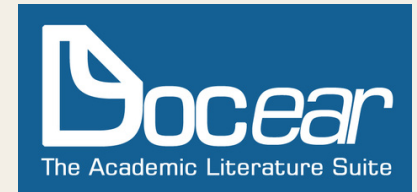
Essential

- Add metadata & PDFs
 - Import bibliographic information from databases & publishers
 - Add & edit manually
- Organise references
 - Type (eg article, book, ...)
 - Metadata (authors, title, ...)
 - Personal groups / folders
 - Sort, search, tag, ...
- Find duplicates
- Read & annotate PDFs
- Cite references & create bibliographies in your word processor using various (editable) styles

Recommended

- Built-in online search with (semi)-automatic import of references incl. PDFs
- Access from everywhere
 - PC, Mac, ...
 - Online / Web
 - iOS / Android
- Share & collaborate
- Import / export metadata (& PDFs) from / to other reference management software
- ...
- ...

Common Reference Management Software



zotero



... and more

Common Reference Management Software

↩ Endnote, Mendeley and Zotero

- Offer all a good variety of essential & recommended features

↩ Endnote (Thomson Reuters)

- Work horse for literature management (1st release 1988)
- Full licence (desktop version PC & Mac) can be obtained via your IT Services allowing for shared library use of up to 15 group members
- Online web client (limited functionality without EN Desktop)
- iOS (iPad) app available
- www.endnote.com, www.myendnoteweb.com

↩ Zotero (open source)

- Intuitive handling due to web browser integration (Firefox)
- Free < 300Mb online storage (expandable \$, Dropbox capable)
- www.zotero.org

↩ Mendeley (Elsevier)

- Strengths in sharing / networking / online collaboration
- Free ≤ 2Gb, ≤ 3 group members (expandable \$\$\$)
- www.mendeley.com

Introduction to Endnote X7

↪ EN's GUI

- Create a new library
- Graphical User Interface

↪ Collect

- Endnote's built-in online search
- Export / import after an external database search
- Import metadata from PDFs
- Manually adding & altering references
- Find & attach full text PDFs

↪ Organise

- Building groups
- Checking & Updating references
- Finding duplicates
- Searching references (incl. PDFs & annotations)
- Backing up your library

↪ Cite

- Bibliographic output styles
- Cite-while-you-write (MS Word)
- Using journal abbreviations

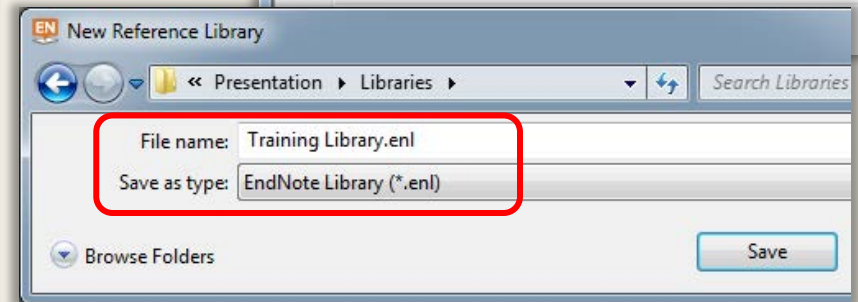
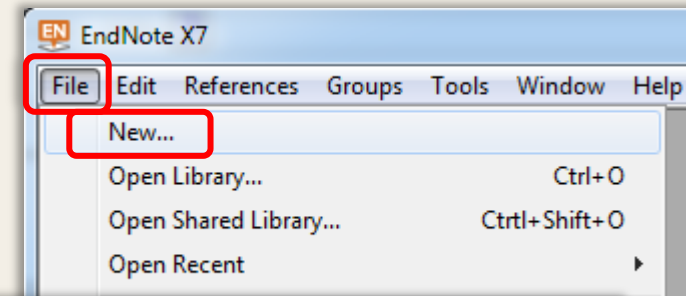
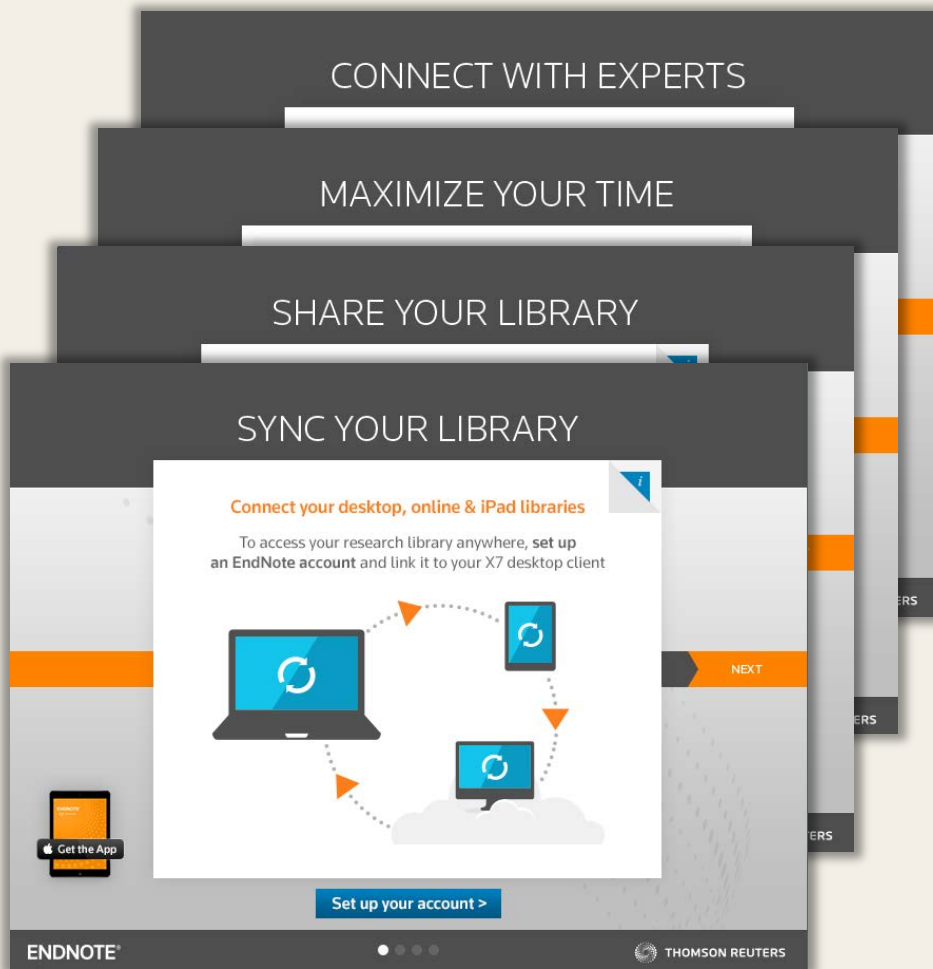
↪ Share & Sync

- Without EN Online Account
 - Share references via E-mail
 - Share travel library via Word plugin
 - Share library as a compressed library or via servers
- With EN Online Account
 - Sync between your devices
 - Share entire library (EN X7.2 only)
 - Share groups (EN Online only)

↪ Concluding Info, Help & Useful Links

- Endnote can do more
- Is Endnote the right thing for me
- User Guides & Tutorials
- Support, Forum, FAQ, Blogs, Community, ...

Create a New Endnote Library



- Tip: Endnote generates an *.ENL file and a *.DATA folder that need to stay together.
- Tip: While the *.ENL file is the library with all metadata, the *.DATA folder is the default location for attachments and also contains library related indexing files.

When EN opens for the first time a welcome screen asks you to setup your online account. There is no need to do this now. Just create a new or open an existing library via the <File> menu.

The Graphical User Interface – Main View

Library
Mode

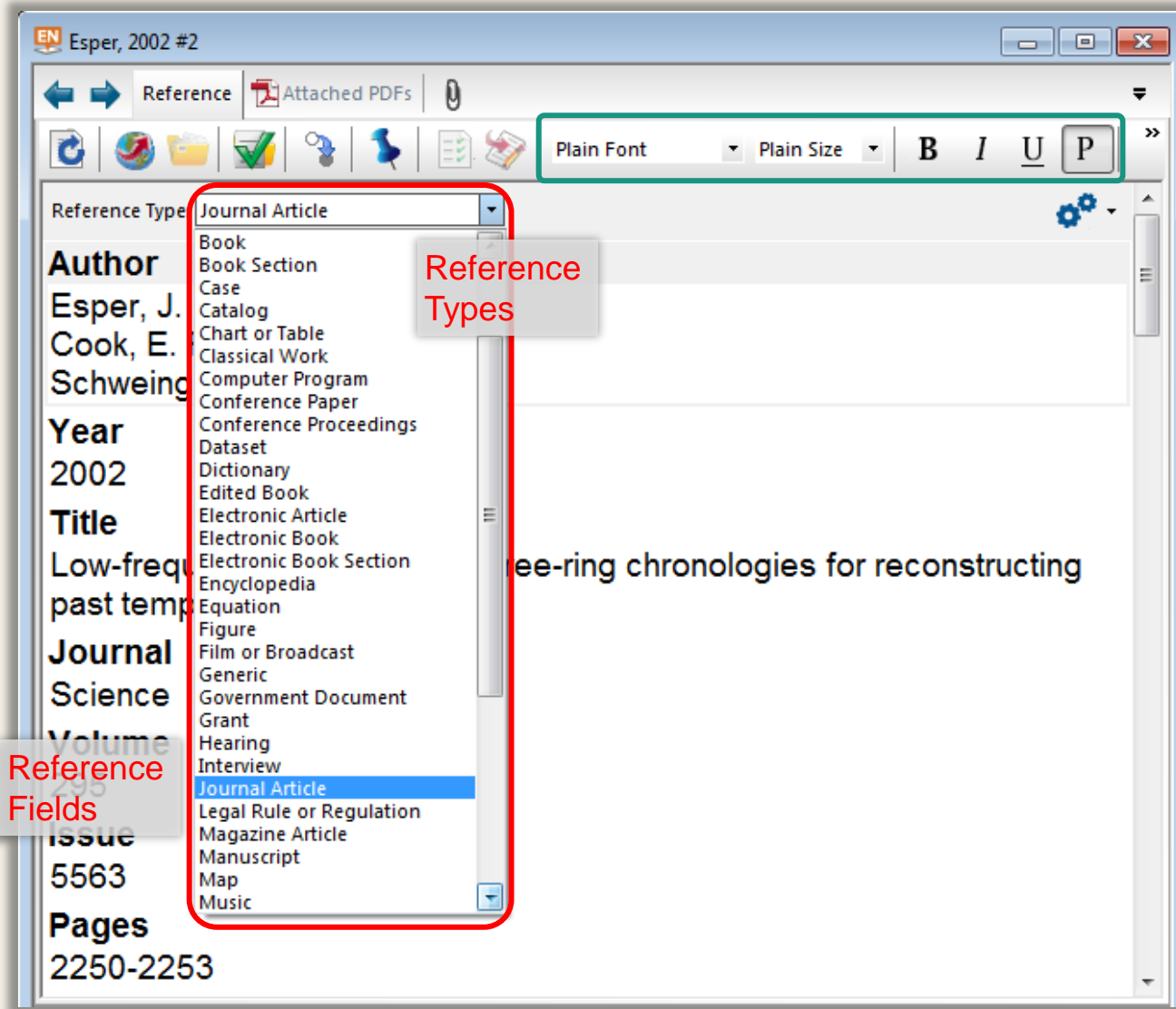
The screenshot shows the EndNote X7 main view with several red annotations and boxes highlighting key features:

- Output Style:** A red box highlights the 'Output Style' dropdown menu in the top toolbar.
- Search panes:** A red box highlights the search area, including the 'Quick Search' field and the search criteria table.
- Search criteria table:**

And	Field	Contains	Value
	Author	Contains	
And	Year	Contains	
And	Title	Contains	
- Reference list pane (sort & find):** A red box highlights the list of references in the center pane.
- Groups pane (organise):** A red box highlights the left pane showing library groups like 'All References', 'Sync Status...', 'Unfiled', 'Trash', 'My Groups', 'Online Search', and 'Find Full Text'.
- Reference details pane:** A red box highlights the right pane showing details for a selected reference, including 'Reference Type', 'Author', 'Year', 'Title', 'Journal', 'Volume', 'Issue', 'Page', 'Start', 'End', and 'Date'.
- Adjust layout:** A red box highlights the 'Layout' button in the bottom right corner.

A double-click on an entry opens the single reference view.

The Graphical User Interface – Single Reference View



Tip: Keep the formatting to <P> (Plain) or else it overrules the formatting of the <Output Style>

- Each reference is associated with a <Reference Type>, eg <Journal Article> and contains in its <Fields>, the metadata, eg <Author>
- Each <Output Style> use this information to generate citations and bibliography in your document

The Graphical User Interface – Citation Preview

The screenshot displays the EndNote X6 software interface. On the left, a sidebar contains sections for 'References', 'Groups', and 'Search'. The 'References' section shows a list of references, with the first one highlighted. A red box highlights the 'Chicago 16th Author-Date' output style dropdown menu in the top left. A red box highlights the 'Preview' tab in the top right. The main window shows a search results table with columns: Author, Year, Title, and Reference Type. The first two rows are highlighted with red boxes. The first row is for Einstein, A. (1963) 'The evolution...' (Book). The second row is for Esper, J.; ... (2002) 'Low-frequen...' (Journal Article). The right pane shows the preview of the selected citation, which is the Esper et al. (2002) article. A red box highlights the preview pane. A red box highlights the 'Chicago 16th Author-Date' output style dropdown menu. A red box highlights the 'Preview' tab. A red box highlights the preview of the selected citation.

Select an Output Style

...and get a glimpse on the effect of the selected <output style> via the preview pane

Chicago 16th Author-Date

Search

Options

Search Whole Library

Match Case

Match Word

Author

Contains

And

Year

Contains

And

Title

Contains

Author

Year

Title

Reference T...

Einstein, A. 1963 The evolution... Book

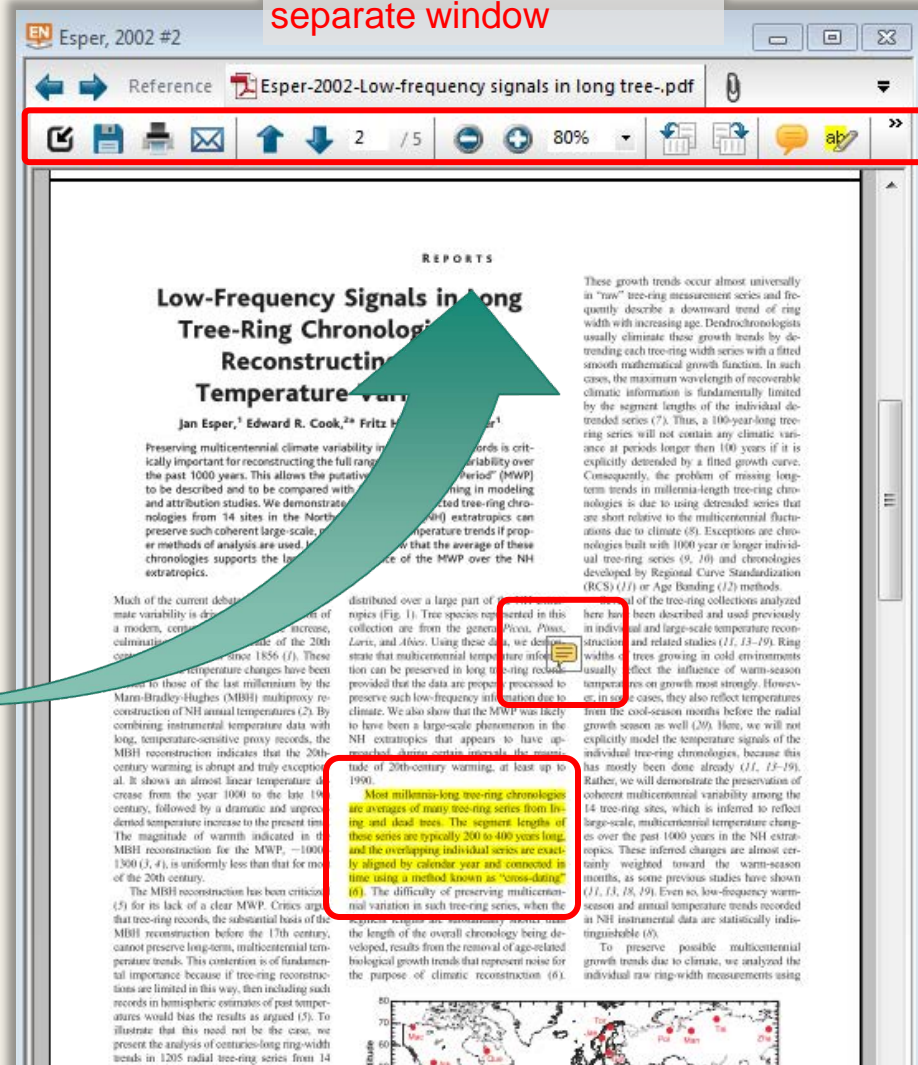
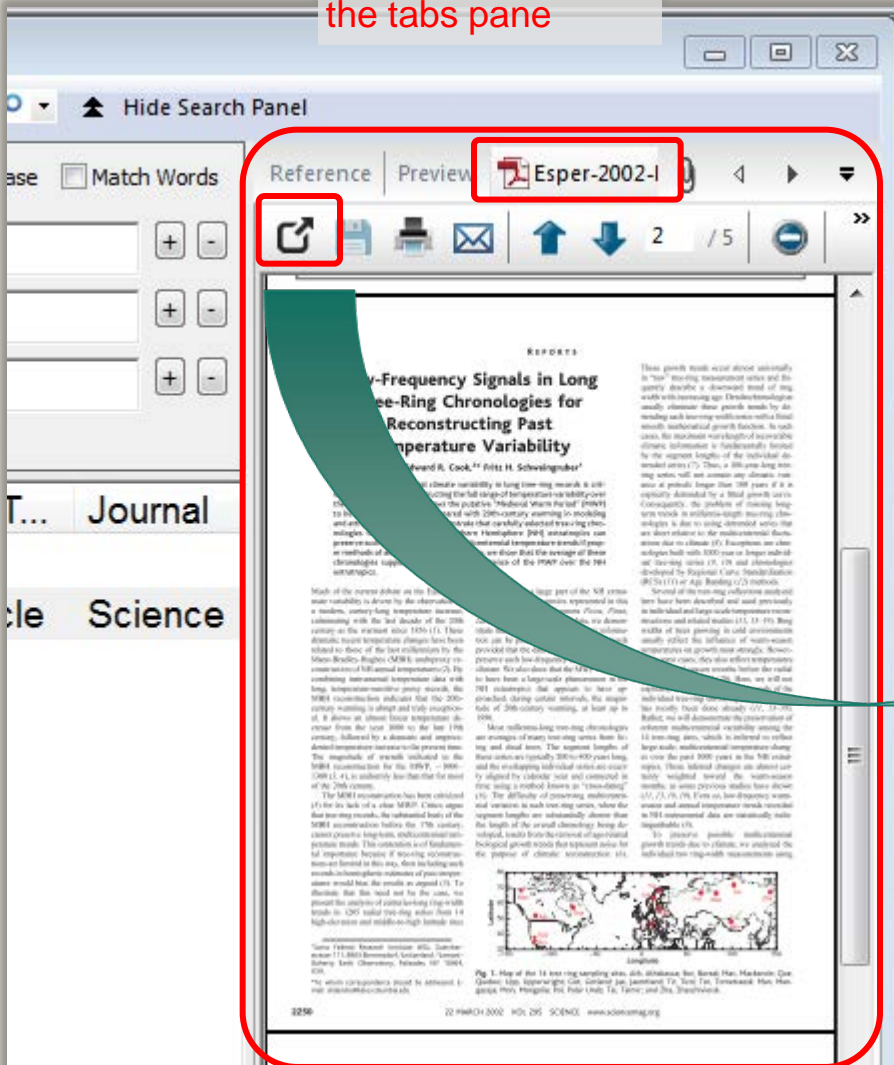
Esper, J.; ... 2002 Low-frequen... Journal Article

Esper, J., E. R. Cook, and F. H. Schweingruber. 2002. "Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability." *Science* 295 (5563):2250-2253. doi: 10.1126/science.1066208.

The Graphical User Interface – PDF Viewer

...quick view via the tabs pane

...read and annotate in a separate window



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- Graphical User Interface

Collect

- Endnote's built-in online search
- Export / import after an external database search
- Import metadata from PDFs
- Manually adding & altering references
- Find & attach full text PDFs

Organise

- Building groups
- Checking & Updating references
- Finding duplicates
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- Bibliographic output styles
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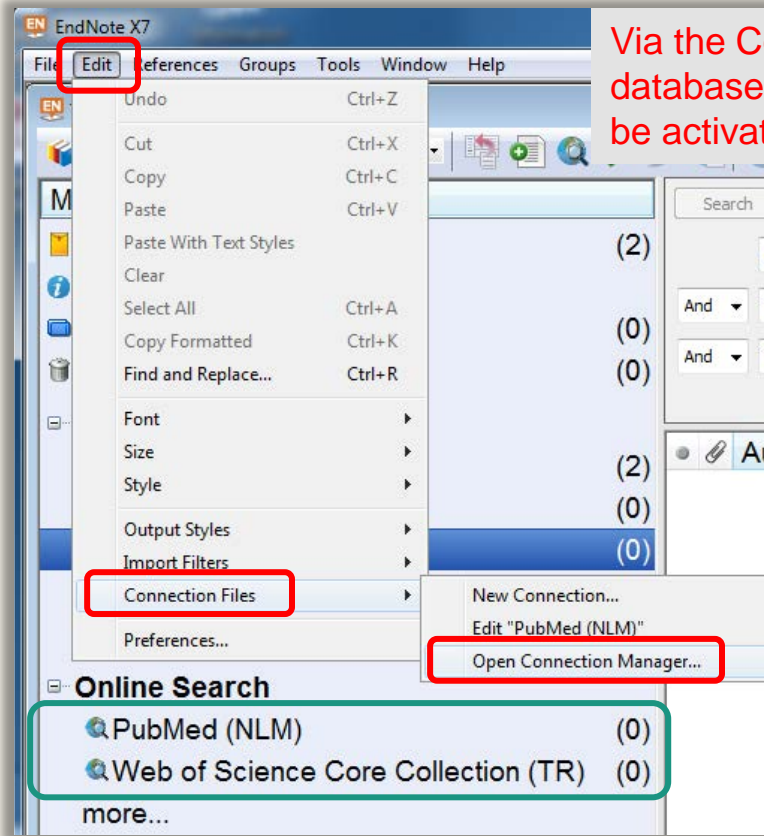
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 - Share groups (EN Online only)

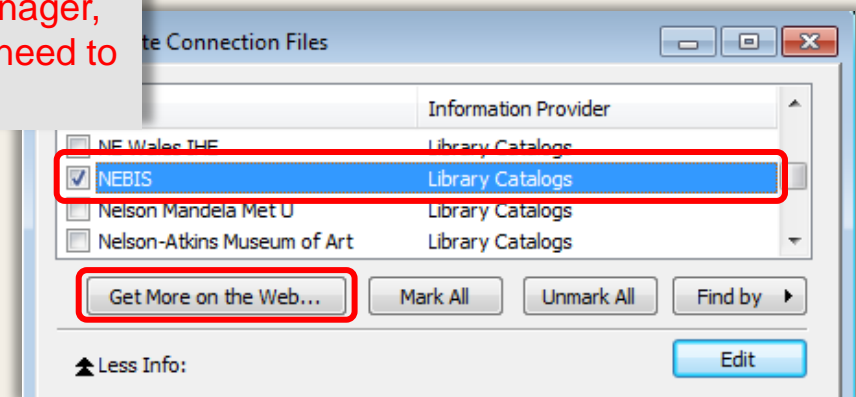
Concluding Info, Help & Useful Links

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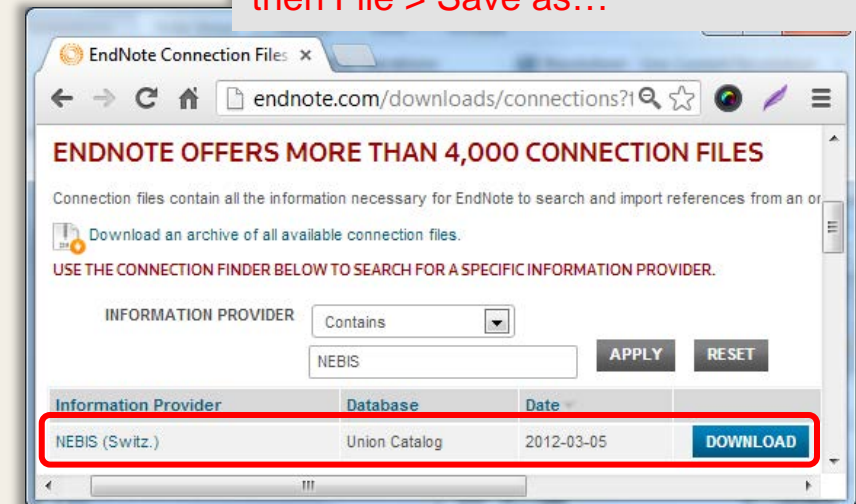
Collect Metadata – EN's Built-in Online Search & Connection Files



Via the Connection Manager, database connections need to be activated



Certain connection files (eg NEBIS) need to be downloaded from the web and installed via double-click, then File > Save as...

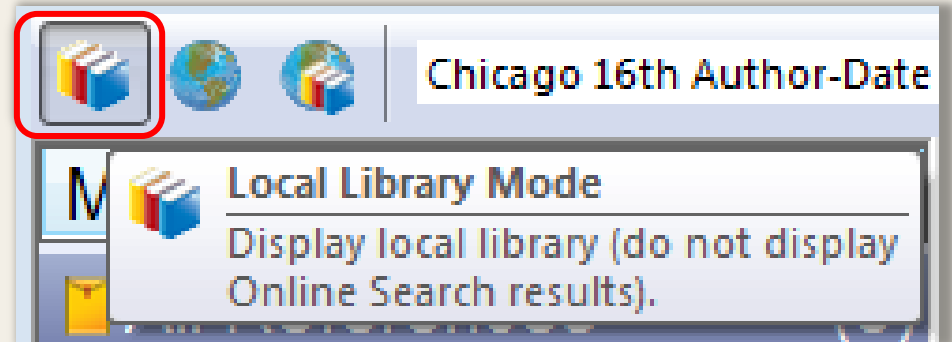


- By default, PubMed & Web of Science are activated
- A NEBIS connection file is available
- Scopus is NOT supported

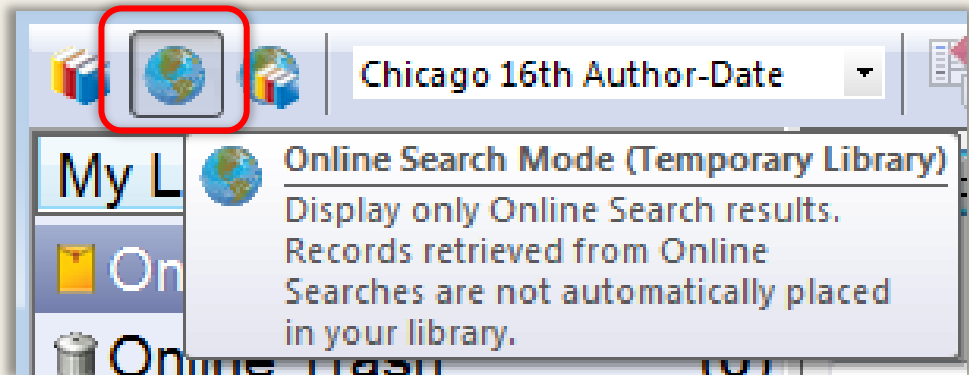
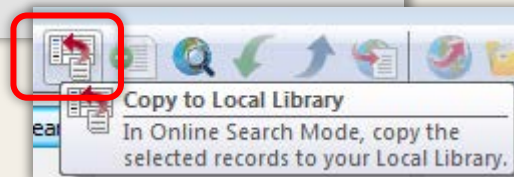
Collect Metadata – Endnote's Library & Search Modes

The 3 modes of Endnote

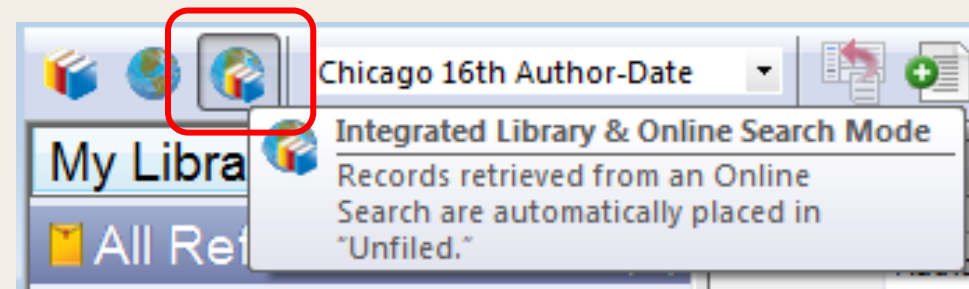
Local Library Mode:
Online Search not available



Online Search Mode:
Local library not available; selected search hits need to be transferred to local library



Integrated Library & Online Search Mode (default):
All search hits are automatically transferred to local library



Collect Metadata – Endnote's Online Search (NEBIS)

1. Switch to Online Search Mode

2. Choose NEBIS

3. Submit Your Search Query

4. Select Reference

The screenshot shows the EndNote X7 Online Mode interface. The 'My Library' pane on the left lists 'Online References (6)', 'Online Trash', and 'Online Search'. Under 'Online Search', 'NEBIS (6)' is selected. The search criteria are set to 'Author' (Freedman), 'Year' (2007), and 'Title' (Statistics). The search results table is displayed below the criteria:

Author	Year	Title	Reference T...	Journal
Freedma...	1978	Statistics	Book	
Freedma...	1991	Statistics	Book	
Freedma...	1998	Statistics	Book	
Freedma...	2007	Statistics	Book	
Freedma...	1980	Statistics	Book	
Freedma...	1997	Statistics	Book	

The right pane shows the details for the selected reference (Freedman, David A. et al., 2007, Statistics, Book, W.W. Norton & Company).

5. Copy Selection to Local Library

6. Switch back to Integrated Library and Online Search Mode

...et voilà

The screenshot shows the EndNote X7 Online Mode interface after the search results have been copied to the local library. The 'My Library' pane on the left lists 'Online References', 'Online Trash', and 'Online Search'. Under 'Online Search', 'NEBIS' is selected. The search criteria are set to 'Author' (Freedman), 'Year' (2007), and 'Title' (Statistics). The search results table is displayed below the criteria:

Author	Year	Title
Einstein, A...	1963	The evolution..
Esper, J.; ...	2002	Low frequen...
Freedma...	2007	Statistics

Collect Metadata – Endnote's Online Search (Web of Science)

1. Switch to Online Search Mode

2. Choose Web of Science

3. Submit Your Search Query

4. Select Reference

The screenshot shows the EndNote X7 Online Search Mode interface. The 'My Library' pane on the left shows 'Online References' (1) and 'Online Trash' (0). The 'Search' pane in the center has a search query for 'Milne' and 'Carbon Nanotubes as field'. The 'Reference' pane on the right shows the search results for 'Journal Article'.

Author	Year	Title	Reference Type	Journal
Milne, W. I.; Teo, ...	2004	Carbon nan...	Journal Article	Journal ..

5. Copy Selection to Local Library

6. Switch back to Integrated Library and Online Search Mode

...et voilà

The screenshot shows the EndNote X7 Online Mode interface. The 'My Library' pane on the left shows 'All References' (4) and 'Copied References' (1). The 'Search' pane in the center has a search query for 'Milne' and 'Carbon Nanotubes as field'. The 'Reference' pane on the right shows the search results for 'Journal Article'.

Author	Year	Title
Einstein, Albert; In...	1963	The
Esper, J.; Cook, E...	2002	Low
Freedman, Davi	2007	Stati
Milne, W. I.; Teo, ...	2004	Cart

Collect Metadata – Endnote's Built-in Online Search

- EN's built-in Online Search is a **handy tool to quickly get metadata**, particularly for articles from the **Web of Science Core Collection**
- Other databases are readily accessible via EN's <Connection Files>

- ↳ Tip: Always switch to EN's <Online Search Mode> before starting an online search and manually transfer selected references to the local library
- ↳ Remember: In <Integrated Library & Search Mode> EN will automatically transfer all references (even unwanted ones) that subsequently would need to be deleted!

Collect Metadata – External Database Search & Import (Scopus)

The screenshot shows the Scopus search results page for the query: (TITLE-ABS-KEY (ozone) AND TITLE-ABS-KEY (wastewater OR "waste water")). The results are sorted by 'Cited by' (Top 3 cited). The 'Export' button is highlighted. A modal window titled 'Choose your default reference manager or file type:' is open, showing 'RIS Format' selected. The 'Citations and abstract information' option is selected under 'Choose the information to export:'. The 'Export' button at the bottom of the modal is highlighted.

Search query: (TITLE-ABS-KEY (ozone) AND TITLE-ABS-KEY (wastewater OR "waste water"))

3,520 document results

Sort on: Date **Cited by** Relevance

Export Download View citation overview View Cited by More...

Select & export eg the top 3 cited references

Choose your default reference manager or file type:

- ☒ Save to Mendeley
- ☒ RefWorks direct export
- ☒ RIS Format EndNote, Reference Manager
- ☐ CSV
- ☐ Excel
- ☐ BibTeX
- ☐ Text ASCII in HTML

Select Endnote export format

Choose the information to export:

Choose the information you want to export to the reference manager or file.

- ☐ Citation information only
- ☒ Citations and abstract information
- ☐ Citations, abstract and references
- ☐ All available information
- ☐ Specify fields to be exported

Include abstract

Export

Top 3 cited

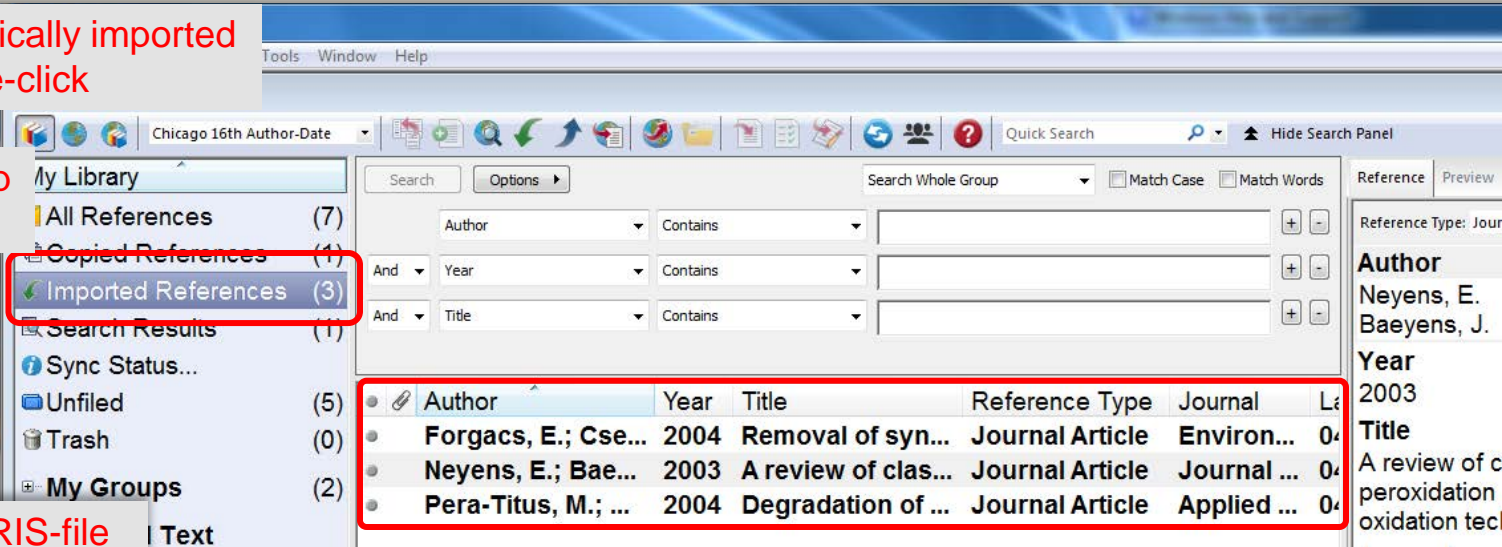
Rank	Title	Year	Cited by
1	Degradation of chlorophenols by means of advanced oxidation processes: A general review	2004	890
2	Removal of chlorophenols by means of advanced oxidation processes: A general review	2004	839
3	A review of advanced oxidation processes for the treatment of wastewater	2004	806

Export to Endnote readable RIS file

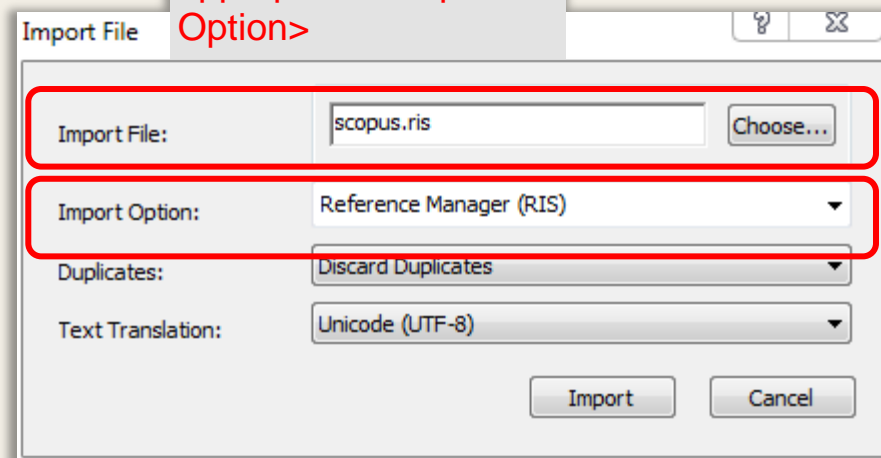
Collect Metadata – External Database Search & Import (Scopus)

RIS-files can be automatically imported into the library via double-click

Note the temporary group <Imported References>



Or import the RIS-file manually via "File > Import > File" and the appropriate <Import Option>



Tip: Other database specific import options/filters (eg Web of Science) can be found and activated via "Edit > Import Filters > Open Filter Manager"

Collect Metadata – External Search & Import (Google Scholar)



Clifford Complexation of Constrained Ligands Piperazine



Scholar

About 292 results (0.07 sec)

Complexation of constrained ligands piperazine, N-substituted and thiomorpholine

SE Clifford, V Tiwow, A Gendron, M Maeder... - Australian journal of chemistry, 2009
Abstract **Complexation** of the symmetric cyclic diamine **piperazine** (1, 4-dimethylpiperazine) has been examined in dry dimethyl formamide by spectrophotometric titrations to define formation constants, and by stopped flow kinetics to define the ...

Cited by 2 Related articles All 4 versions **Cite** Save More

Cite

Copy and paste a formatted citation or use one of the links to import into a bibliography manager.

MLA Clifford, Sarah E., et al. "Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine." *Australian journal of chemistry* 62.10 (2009): 1196-1206.

APA Clifford, S. E., Tiwow, V., Gendron, A., Maeder, M., Rossignoli, M., Lawrance, G. A., ... & Schroeder, M. (2009). Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine. *Australian journal of chemistry*, 62(10), 1196-1206.

Chicago Clifford, Sarah E., Vanny Tiwow, Aleasia Gendron, Marcel Maeder, Monica Rossignoli, Geoffrey A. Lawrance, Peter Turner, Alexander J. Blake, and Martin Schroeder. "Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine." *Australian journal of chemistry* 62, no. 10 (2009): 1196-1206.

EndNote RefMan RefWorks

EndNote



Save As

Neuhold, Bobby Downloads Search Downloads

File name: scholar.enw

Save as type: EndNote Import File

Browse Folders

Save

Cancel

ENW-files can be automatically imported into EN's library via double-click

Collect Metadata – External Catalogue Search & Import (NEBIS)

Guest ☒ e-Shelf Sign in

New Search | NEBIS Libraries | Help | Other Catalogs | Language: English▼

NEBIS

Schwarzenbach Environmental Orga x NEBIS network catalogue Search Advanced Search

All items ▼ containing my search terms ▼ anywhere ▼

Environmental organic chemistry
René P. Schwarzenbach, Chemist, Switzerland, 1945 -; Philip M. Gschwend;
Dieter M. Imboden, Physicist, Limnologist, Switzerland, 1943 -
2003

Locations & Request Details

Title: Environmental organic chemistry
Additional Title Information: Rene P. Schwarzenbach,
Philip M. Gschwend, Dieter M. Imboden
Place, Publisher: Hoboken, New Jersey : Wiley-
Interscience
Creation Date: 2003
Edition: 2nd ed.

Actions▼
Add to e-Shelf
E-mail
Print
Permalink
Citation
EndNote Web
Delicious
Export RIS

Tip: Importing the RIS-file from NEBIS into Endnote swaps the order of author's first and last names

Export RIS-file and import via double-click

Collect Metadata – External Catalogue Search & Import (Publisher)

Springer Handbook of Mechanical Engineering

2009, pp 1149-1266

Construction Machinery

Eugeniusz Budny Prof., Mirosław Chłosta Dr., Henning Jürgen Meyer Prof.,
Mirosław J. Skibniewski Prof.



Download PDF (5,540 KB)



View Printer Friendly Version

Abstract

In this chapter the most common classes of machinery found on construction



Look
Inside

Other actions

- » Reprints and Permissions [↗](#)
- » Export citation
- » About this Reference Work [↗](#)
- » Add to Papers [↗](#)



Tip: Citations for book chapters are often best obtained via the publisher's website

Select Download

- » ProCite (RIS)
- » Reference Manager (RIS)
- » Ref Works (RIS)
- » BookEnds (RIS)
- » EndNote (RIS)
- » PubMed (TXT)
- » Text only (TXT)
- » BibTeX (BIB)

Book chapter

Export Endnote-file and import via double-click

Collect Metadata – Extract Metadata from PDFs

Double-check EN's PDF filename settings via Edit > Preferences > PDF Handling

EndNote Preferences

Change Case
Display Fields
Display Fonts
Duplicates
Find Full Text
Folder Locations
Formatting
Libraries
PDF Handling
Read / Unread
Reference Types
Sorting
Spell Check
Sync
Temporary Citations

PDF Auto Renaming Options

- ☐ Don't Rename
☒ Author + Year + Title
☐ Author + Title
☐ Author + Year
☐ Title
☐ Custom

Note: Filenames may be up to 50 characters long.

Existing PDF-files (incl. its metadata) can be imported via File > Import > File

Import File

Import File:

Esper_2002.pdf

Choose...

Import Option:

PDF

Duplicates:

Discard Duplicates

Text Translation:

Unicode (UTF-8)

Import

Cancel

Reference

Preview

Esper-2002

Reference Type: Journal Article

Author

Esper, J.

Cook, E. R.

Schweingruber, F.

Year

2002

Title

Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability

Journal

Science

Volume

295

Issue

5563

Pages

2250-2253

Tip: PDF-file renaming can also be done later, even as a batch, via References > File Attachments > Rename PDFs

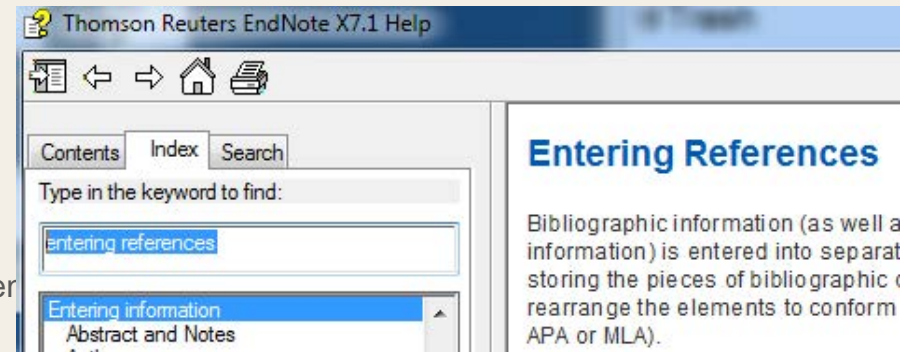
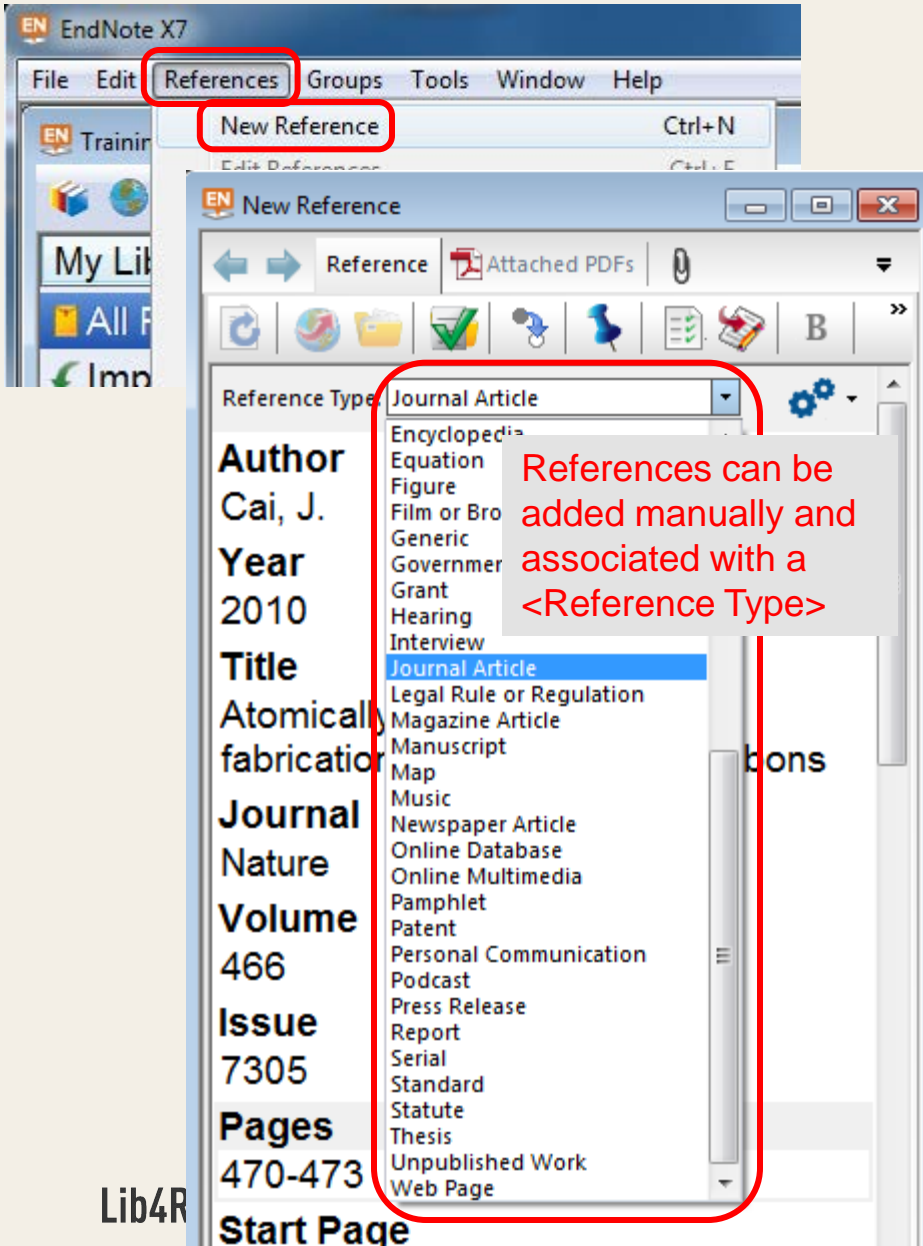
Tip: DOI needs to be present to allow for the extraction of metadata from PDFs

Existing PDF annotations are kept during import

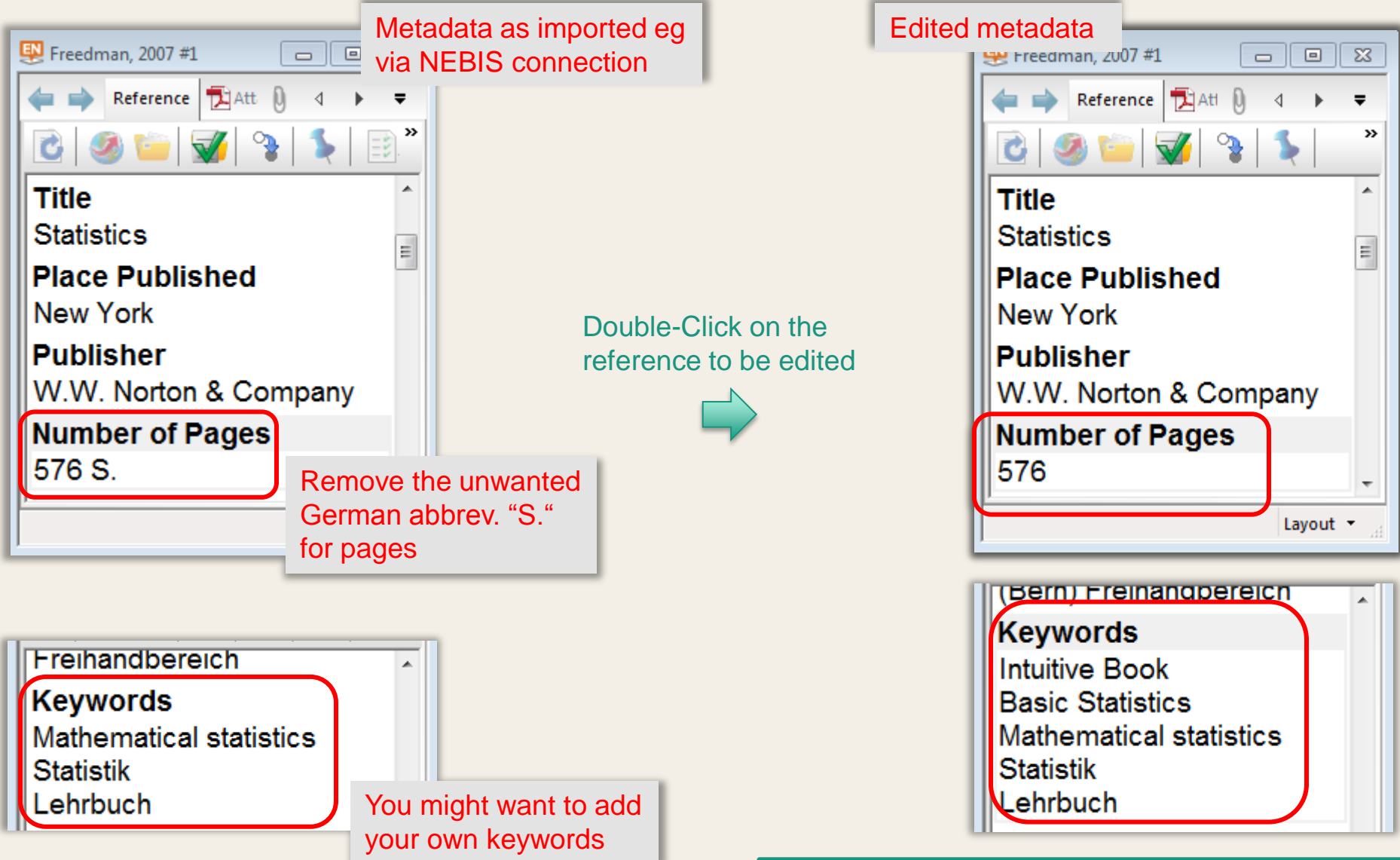
Collect Metadata – Manual Addition of references

- For the manual addition of references **you need to obey a certain syntax and rules** regarding the input of the metadata into the respective fields
- Most of the rules are pretty straightforward and their effect (for a given output style) can be seen in the preview tab

- ⇒ Tip: Compare your syntax with some already existing (imported) references of the same reference type
- ⇒ Tip: EN's built-in Help index (F1) gives advice on entering references manually

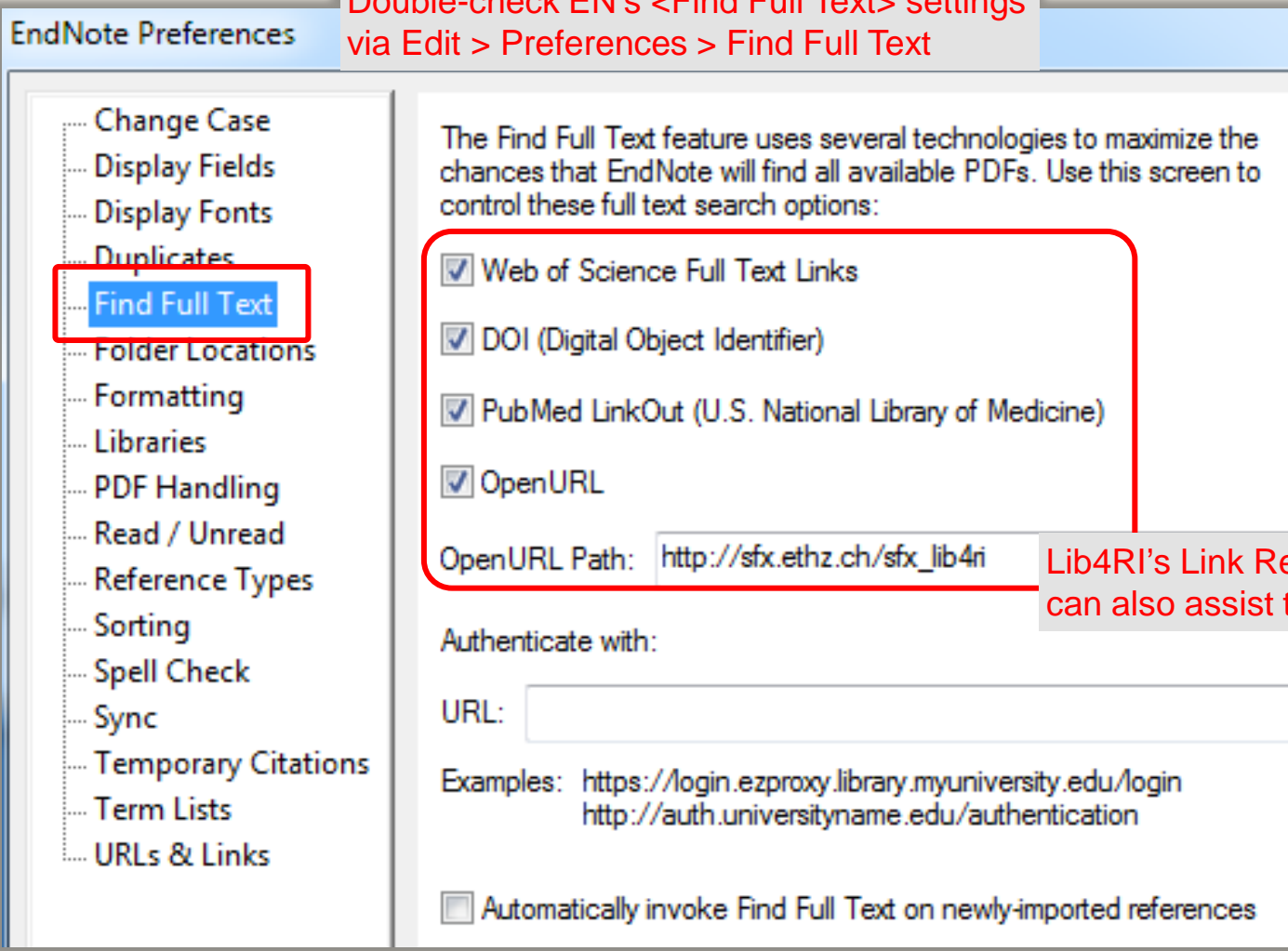


Collect Metadata – Manual Alteration / Editing of references



Find & Attach Fulltext PDFs

Double-check EN's <Find Full Text> settings via Edit > Preferences > Find Full Text



The screenshot shows the 'EndNote Preferences' dialog box with the 'Find Full Text' tab selected. The left sidebar lists various preference categories, with 'Find Full Text' highlighted. The main panel contains instructions and several checked options: 'Web of Science Full Text Links', 'DOI (Digital Object Identifier)', 'PubMed LinkOut (U.S. National Library of Medicine)', and 'OpenURL'. The 'OpenURL Path' is set to 'http://sfx.ethz.ch/sfx_lib4ri'. Below this, there is a section for authentication with a URL input field and examples. At the bottom, there is an unchecked checkbox for 'Automatically invoke Find Full Text on newly-imported references'. A red box highlights the 'Find Full Text' option in the sidebar and the four checked options in the main panel. A grey callout box points to the 'OpenURL Path' field.

EndNote Preferences

- Change Case
- Display Fields
- Display Fonts
- Duplicates
- Find Full Text**
- Folder Locations
- Formatting
- Libraries
- PDF Handling
- Read / Unread
- Reference Types
- Sorting
- Spell Check
- Sync
- Temporary Citations
- Term Lists
- URLs & Links

The Find Full Text feature uses several technologies to maximize the chances that EndNote will find all available PDFs. Use this screen to control these full text search options:

- ☒ Web of Science Full Text Links
- ☒ DOI (Digital Object Identifier)
- ☒ PubMed LinkOut (U.S. National Library of Medicine)
- ☒ OpenURL

OpenURL Path:

Authenticate with:

URL:

Examples: <https://login.ezproxy.library.myuniversity.edu/login>
<http://auth.universityname.edu/authentication>

☐ Automatically invoke Find Full Text on newly-imported references

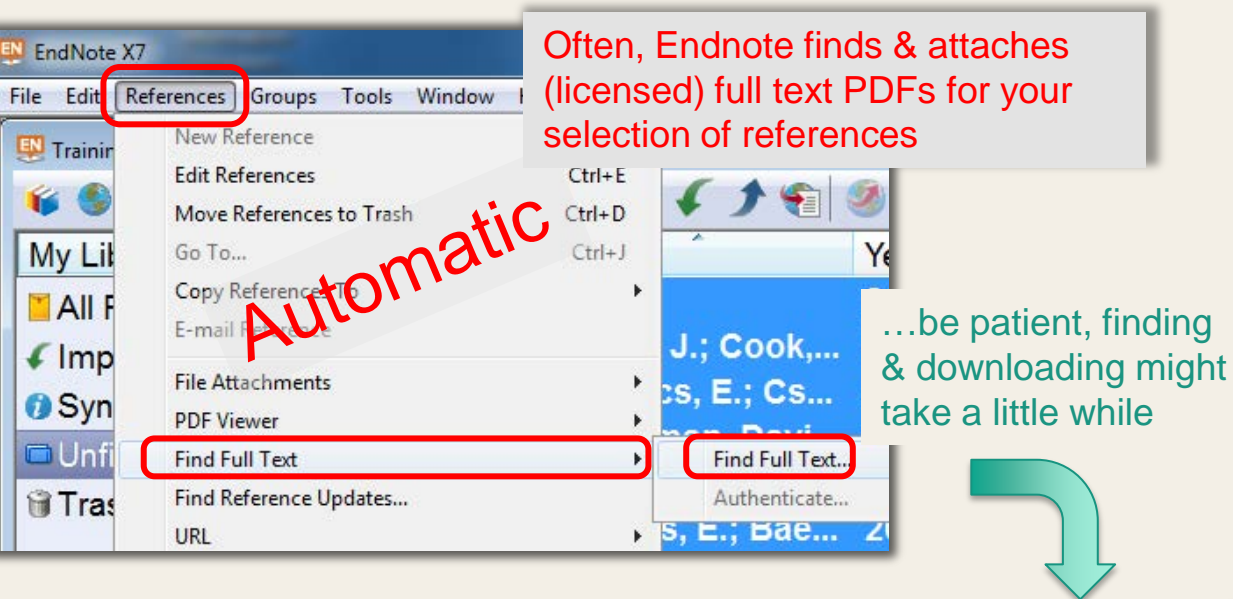
Lib4RI's Link Resolver can also assist to find full text

Find & Attach Fulltext PDFs – EN's <Find Full Text> Function

Often, Endnote finds & attaches (licensed) full text PDFs for your selection of references

Automatic

...be patient, finding & downloading might take a little while

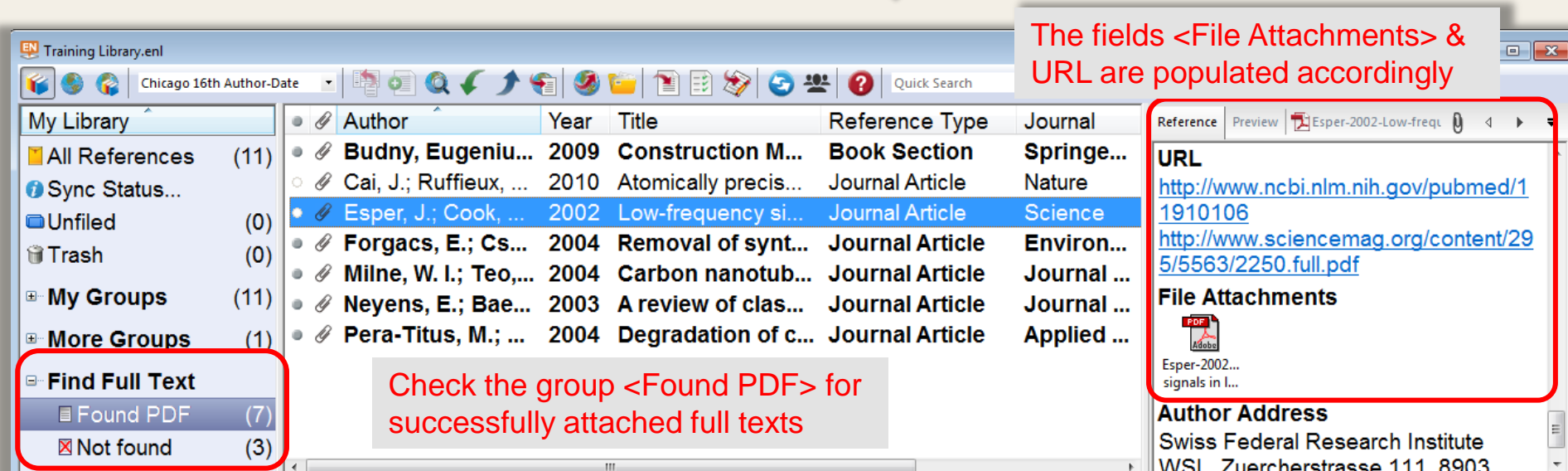


The screenshot shows the EndNote X7 application window. The 'References' menu is open, and 'Find Full Text' is highlighted. A red box is drawn around the 'Find Full Text' option. A red box is also drawn around the 'Find Full Text...' option in the submenu. A green arrow points from the 'Find Full Text...' option in the submenu to the 'Find Full Text' option in the main menu.

- Tip: Use EN's PDF file auto-renaming (see Edit > Preferences > PDF Handling)
- Tip: You can find the PDFs in the folder *.DATA \ PDF

The fields <File Attachments> & URL are populated accordingly

Check the group <Found PDF> for successfully attached full texts



The screenshot shows the EndNote X7 library view. The 'My Library' group is selected, and the 'Found PDF' group is highlighted. The 'Found PDF' group contains 7 references. The 'Not found' group contains 3 references. The 'Found PDF' group is highlighted with a red box. The 'Found PDF' group is highlighted with a red box. The 'Found PDF' group is highlighted with a red box.

Author	Year	Title	Reference Type	Journal
Budny, Eugeniu...	2009	Construction M...	Book Section	Springe...
Cai, J.; Ruffieux, ...	2010	Atomically precis...	Journal Article	Nature
Esper, J.; Cook, ...	2002	Low-frequency si...	Journal Article	Science
Forgacs, E.; Cs...	2004	Removal of synt...	Journal Article	Environ...
Milne, W. I.; Teo, ...	2004	Carbon nanotub...	Journal Article	Journal ...
Neyens, E.; Bae...	2003	A review of clas...	Journal Article	Journal ...
Pera-Titus, M.; ...	2004	Degradation of c...	Journal Article	Applied ...

URL

<http://www.ncbi.nlm.nih.gov/pubmed/1910106>

<http://www.sciencemag.org/content/295/5563/2250.full.pdf>

File Attachments

Esper-2002... signals in l...

Author Address

Swiss Federal Research Institute
WSL, Zuercherstrasse 111. 8903

Find & Attach Fulltext PDFs – Guided via Lib4RI's Link Resolver

Training Library.enl

Chicago 16th Author-Date

My Library	Author	Year
All References (11)	Clifford, Sarah ...	2009
Sync Sta	Freeman, David...	2007
Unfiled	ch, ...	2003
Trash		
My Groups		
More Group		
Find Full Text		
Found PDF (7)		
Not found (3)		

Right Click a reference and goto URL > OpenURL Link

Find Full Text

Find Reference Updates...

URL

OpenURL Link

For those <Not Found>, Lib4RI's link resolver may provide help to get to the full text

Showing 3 of 3 references in Group. (All References: 11)

Lib4RI

Link Resolver

Title: Complexation of constrained ligands piperazine, N-substituted piperazine, and thiomorpholine

Source: Australian journal of chemistry [0004-9425] Clifford yr:2009 vol:62 pt:1 pg:1196 -1206

Full text

This title is not subscribed or the volume is not part of the licensing period. Please order a copy via NEBIS or via our Document Delivery Service below.

Further options to get it

Google Scholar - Search with the Article Title

NEBIS - Check availability in the library catalogue to order a copy

Document Delivery

Show Search Panel

Reference

Clifford-20...

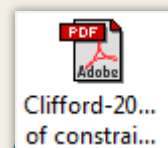
Issue 10

Pages 1196-1206

ISSN 1445-0038

File Attachments

Clifford-20... of constrai...



... or search for the PDF yourself...

...and for manual attachment, drag'n drop the PDF into the reference tab pane of the corresponding reference

Eg, file a NEBIS copy request to get a PDF-scan of the article as it is not part of our licensing

Introduction to Endnote X7

EN's GUI

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Collect

- Create a new library
- Graphical User Interface
- Endnote's built-in online search
- Export / import after an external database search
- Import metadata from PDFs
- Manually adding & altering references
- Find & attach full text PDFs

Organise

- Building groups
- Checking & Updating references
- Finding duplicates
- Searching references (incl. PDFs & annotations)
- Backing up your library

Cite

- Bibliographic output styles
- Cite-while-you-write (MS Word)
- Using journal abbreviations

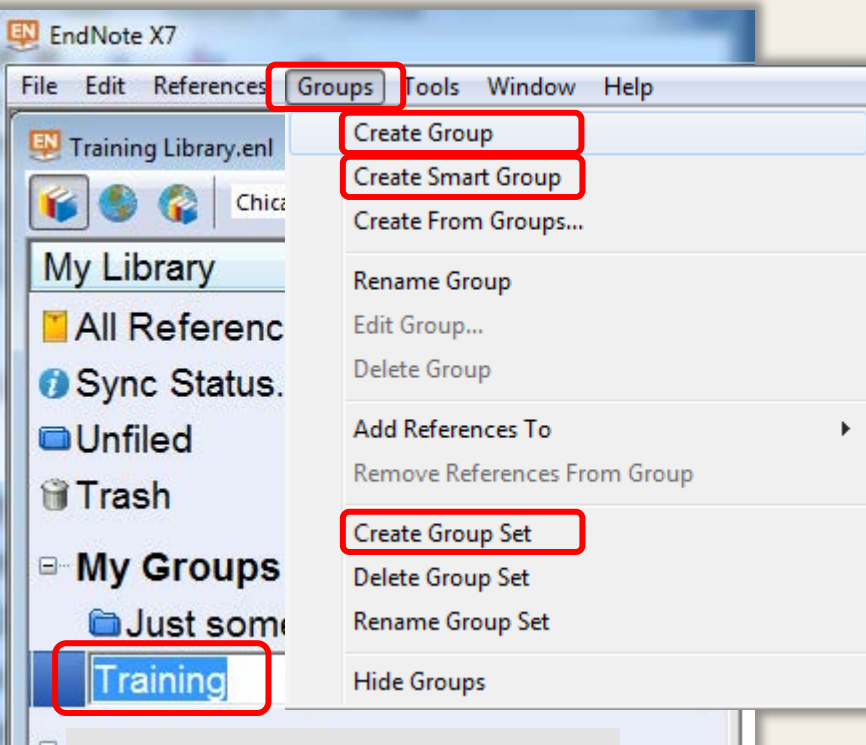
Share & Sync

- Without EN Online Account
 - Share references via E-mail
 - Share travel library via Word plugin
 - Share library as a compressed library or via servers
- With EN Online Account
 - Sync between your devices
 - Share entire library (EN X7.2 only)
 - Share groups (EN Online only)

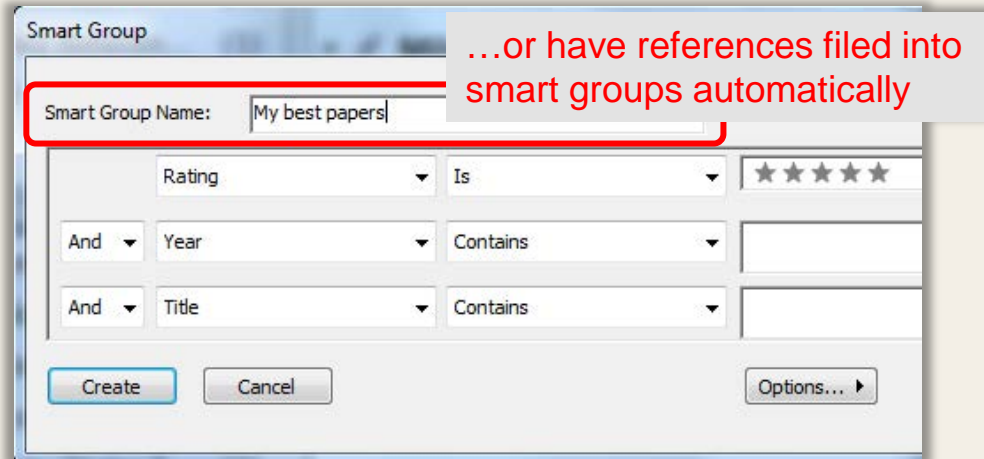
Concluding Info, Help & Useful Links

- Endnote can do more
- Is Endnote the right thing for me
- User Guides & Tutorials
- Support, Forum, FAQ, Blogs, Community, ...

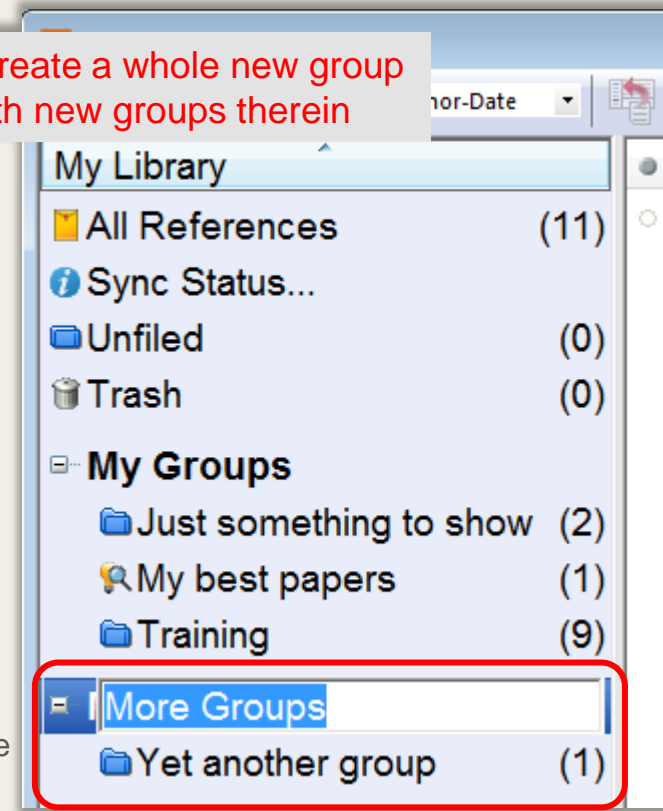
Organising your Library – Grouping References



Create groups and drag'n drop
<Unfiled> references in there



...or create a whole new group
set with new groups therein



- Tip: Work with one library only and rather assign references to groups suiting your different purposes (eg your different papers, theses, ...)
- Tip: One reference can be a member of multiple groups (no duplicates are created)

Organising your Library – Checking & Updating References

Highlight one or more references in your library and try to find available updates via References > Find Reference Updates

Reference Preview Attached PDFs

Reference Type: Book

Author
Freedman, David A.
Pisani, Robert
Purves, Roger

Year
2007

Title
Statistics

Place Published
New York

Publisher
W.W. Norton & Company

Number of Pages
576 S.

Edition

Check references for “obvious” typos or issues, eg, NEBIS often exports into the field for <page numbers> the German abbreviation “S.” for pages

Available Updates

Alternate Journal
Aust J Chem

ISSN
0004-9425

DOI
Doi 10.1071/Ch09313

Original Publication

Reprint Edition

Update All Fields ->
Update Empty Fields ->

Reference Type: Journal Article

My Reference

Alternate Journal

ISSN
1445-0038

DOI

Original Publication

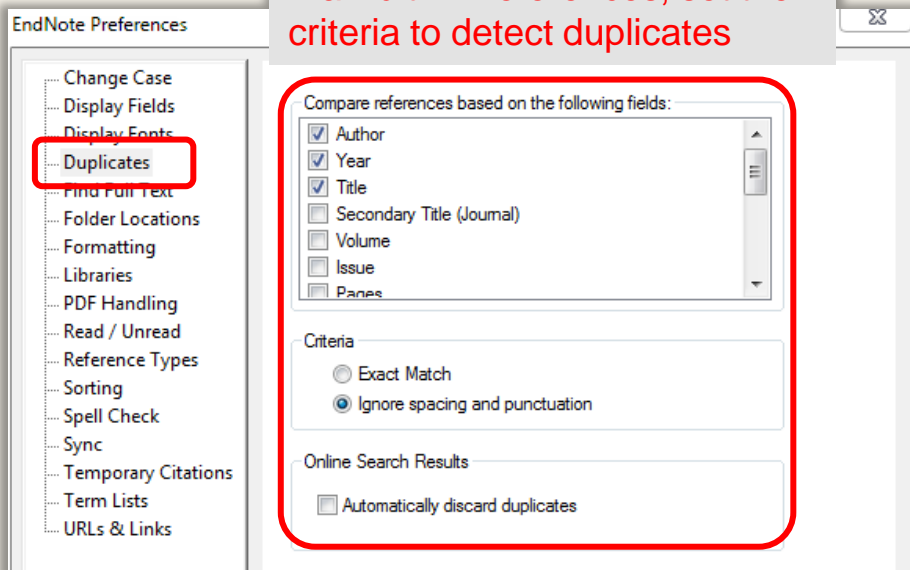
Reprint Edition

Save Updates Skip

- Tip: If you don't want to update all or empty fields only, you can also just copy / paste individual fields. Don't forget to save your updates.
- This tool is particularly handy for updating manually & incomplete input references

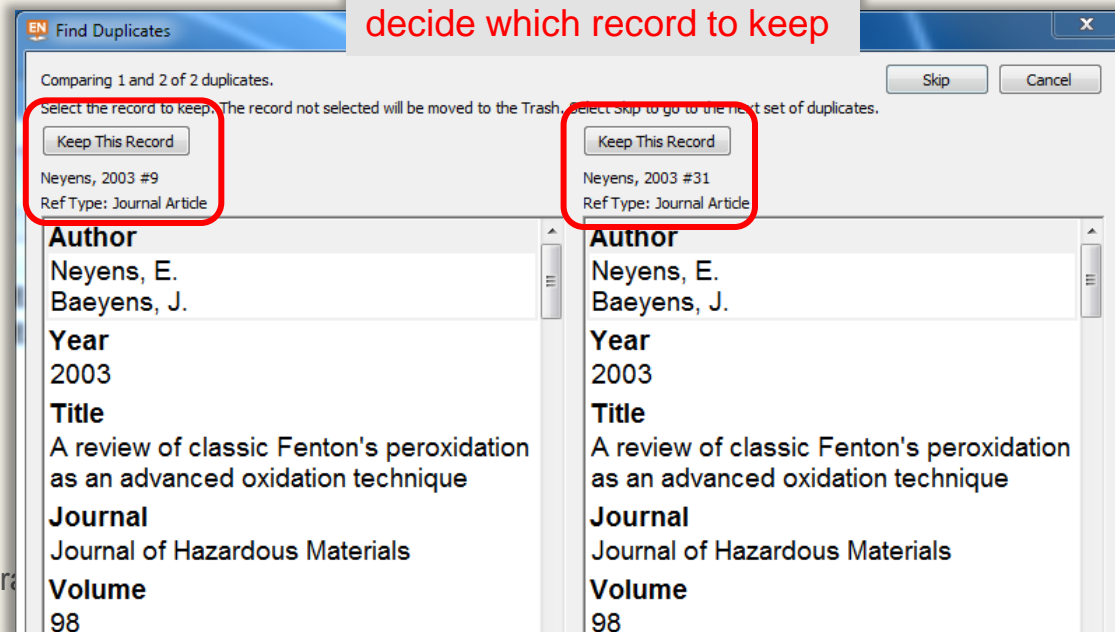
Organising your Library – Finding Duplicates

Via Edit > Preferences, set the criteria to detect duplicates



Tip: Endnote assigns unique and increasing record numbers (below, #9 and #31) to all references. This can become handy to quickly identify a “later” duplicate from an “early” original without having to double-check all fields.

For all found duplicates, decide which record to keep



Organising your Library – Searching Your Library

The advanced search box allows to search for Boolean combinations of various fields, such as author, year, title, keywords, etc

Quick Search is often sufficient. Phrase search (" ") and wildcards (*) can be used. PDFs are searched as well!

The screenshot displays the EndNote Training Library interface. On the left, a sidebar shows 'My Library' with categories like 'All References (11)', 'Sync Status...', 'Unfiled (0)', 'Trash (0)', 'My Groups' (including 'Just somethin... (1)', 'My best papers (1)', 'Training (10)'), 'More Groups' (including 'Yet another g... (1)'), and 'Find Full Text'. The main search area features a search bar with the text 'multicentennial climate v' and a dropdown menu. Below the search bar, a table of search results is shown, with the first result highlighted:

Author	Year	Title	Reference Type	Journal
Esper, J.; Cook, ...	2002	Low-frequency si...	Journal Article	Science

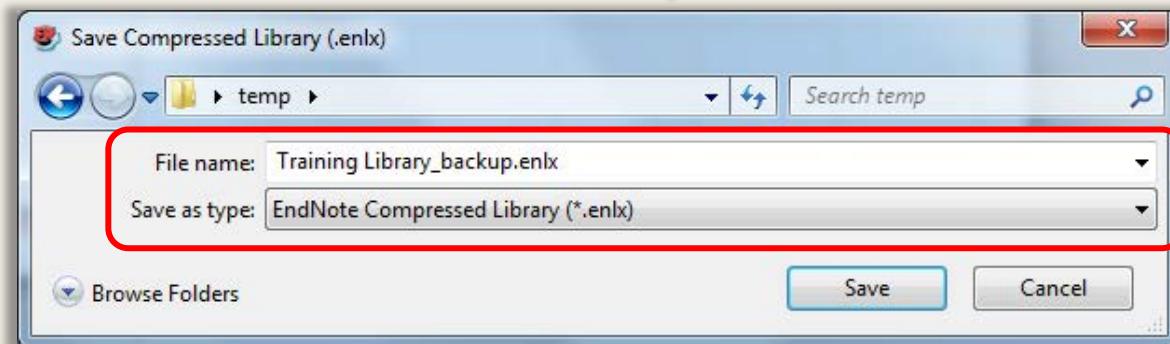
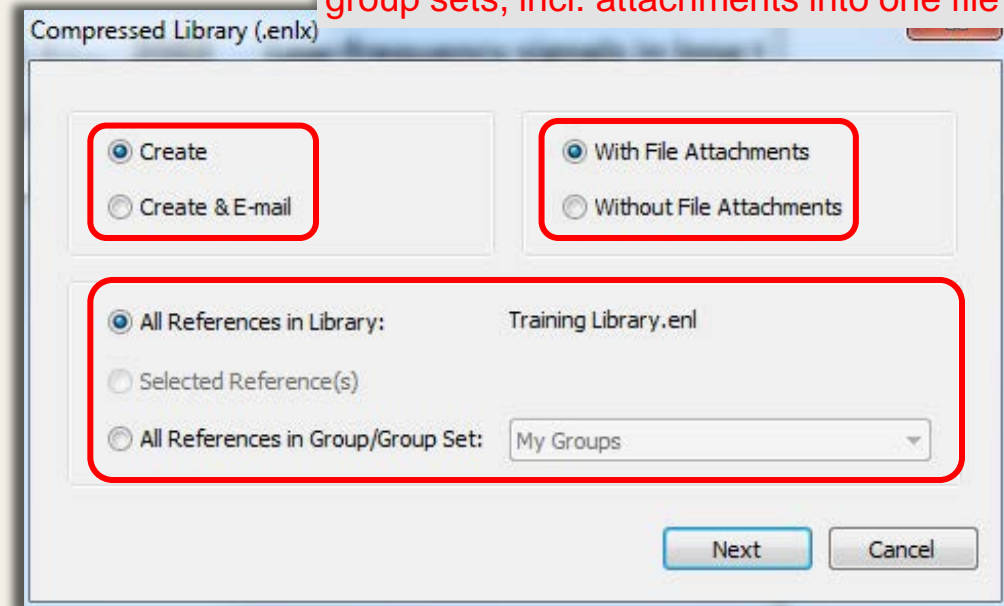
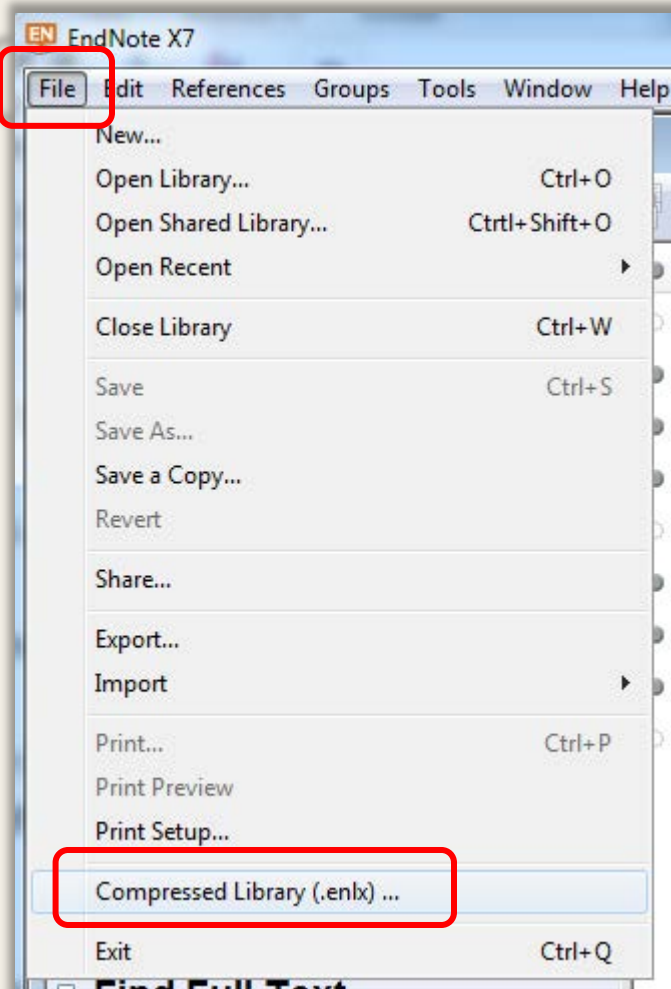
On the right, a preview of the selected article is shown, titled 'Low-Frequency Signal in Tree-Ring Chronologies: Reconstructing Temperature Variability'. The abstract text includes the phrase 'multicentennial climate variability' highlighted in yellow.

Showing 1 of 10 references in Group. (All References: 11)

Tip: Imported references often have the fields <Keywords> already populated. You might even consider adding your own keywords to references as they are all searchable.

Organising your Library – Backup

Archive the whole library or just groups or group sets, incl. attachments into one file



Tip: When compressed ENLX-files are re-opened, EN regenerates the original *.ENL file and *.DATA folder

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 - Share library as a compressed library or via servers
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 - Share entire library (EN X7.2 only)
 - Share groups (EN Online only)

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- User Guides & Tutorials
- Support, Forum, FAQ, Blogs, Community, ...

Cite – Bibliographic Output Styles

- Output styles determine how references will be formatted and displayed in your bibliography or in your text document
- EN's <Style Manager> provides > 5000 styles (incl. demands for most journals)

EndNote Styles

Select your favourite styles so they will be accessible EN's main menu

Via EN's Style Manger (Edit > Output Styles > Style Manager) you can

- Select favourite styles & preview
- Get more styles
- Edit Styles

Get More on the Web... Mark All Unmark All Find by

Style Info/Preview Edit

Less Info:

Billoski, T. V. (1992) *Introduction to Paleontology*, 6th ed., New York: Institutional Press.

Morehouse, S. I. and Tung, R. S. (1993) Statistical evidence for early extinction of reptiles due to the K/T event. *Journal of Paleontology*, 17(2), pp. 198-209.

Schwartz, M. T. and Billoski, T. V. (1990) Greenhouse hypothesis: effect on dinosaur extinction. in Jones, B. T. and Lovcraft, N. V., (eds.) *Extinction*. New York: Barnes and Ellis. pp. 175-189.

Preview

Cite – Bibliographic Output Styles

- With EN's <Style Editor> you can make many style adjustments effecting layout & formatting of all <reference types> (eg book, journal article, etc)

- ↳ Tip: EN's style editor is **very powerful and can require a fair bit of training** to get used to the **rules and special characters** that effect the formatting of your citations/bibliography.
- ↳ Tip: If you want to create/alter a style
 - ↳ Using EN's style manager, **find & select the one closest** to your liking and open it with EN's style editor
 - ↳ **Save the style under a different name** and tag it in the style manager as a favourite
 - ↳ Select the style in EN's main menu
 - ↳ **Make changes to the style according to EN's help (F1) and observe the effects** for a selected reference in the preview pane of EN's main window (after saving)

Cite – Bibliographic Output Styles

The screenshot displays the Lib4RI software interface for managing bibliographic output styles. The main window is titled 'Harvard (NUIG) Copy'. On the left, a sidebar lists various settings categories, with 'Page Numbers' highlighted. The 'Page Number Format' section on the right shows several options, with 'Abbreviate the last page number (e.g. 123-5)' selected. A red box highlights this option, and a text box next to it states: 'Small changes such as the display of page number are rather straightforward.'

Below the settings, a 'Reference Type' list is visible, showing entries like 'Budn...', 'Cai, J...', 'Cliffo...', 'Einst...', and 'Espe...'. The 'Cliffo...' entry is selected, and its details are shown in the 'Preview' pane on the right. The preview shows the following reference entry:

Clifford, S. E., Tiwow, V., Gendron, A., Maeder, M., Rossignoli, M., Lawrance, G. A., Turner, P., Blake, A. J. and Schroeder, M. (2009) Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine. *Australian journal of chemistry*, 62(10), pp. 1196-206.

The 'Preview' pane also shows a 'Search Whole Library' button and a 'Contains' dropdown menu. The bottom status bar indicates 'Showing 11 of 11 references.'

Cite – Bibliographic Output Styles

Harvard (NUIG) Copy

Plain Font Plain Size B I U P A¹ A₁ Σ A_{BC}

About this Style
Punctuation
Anonymous Works
Page Numbers
Journal Names
Sections
Citations
Templates
Ambiguous Citations
Author Lists
Author Name
Numbering
Sort Order
Bibliography
Templates
Field Substitutions
Layout
Sort Order
Categories
Author Lists
Author Name
Editor Lists
Editor Name
Title Capitalization

Bibliography

Reference Types ▶ Insert Field ▶

Directed by Director
Place Published
Distributor Date
Released Running Time
Medium

Journal Article
Author (Year) Title Journal
Volume (Issue), pp.
Pages (DOI).

Magazine Article
Author (Year) Title
Magazine, Date, p. pp.
Pages.

Map
Cartographer (Year) Title
Scale Place Published
Publisher.

Newspaper Article

Others, such as the addition of the field <DOI> to the reference type <Journal Articles>, require a bit more knowhow (F1).

Training Library.enl

Harvard (NUIG) Copy

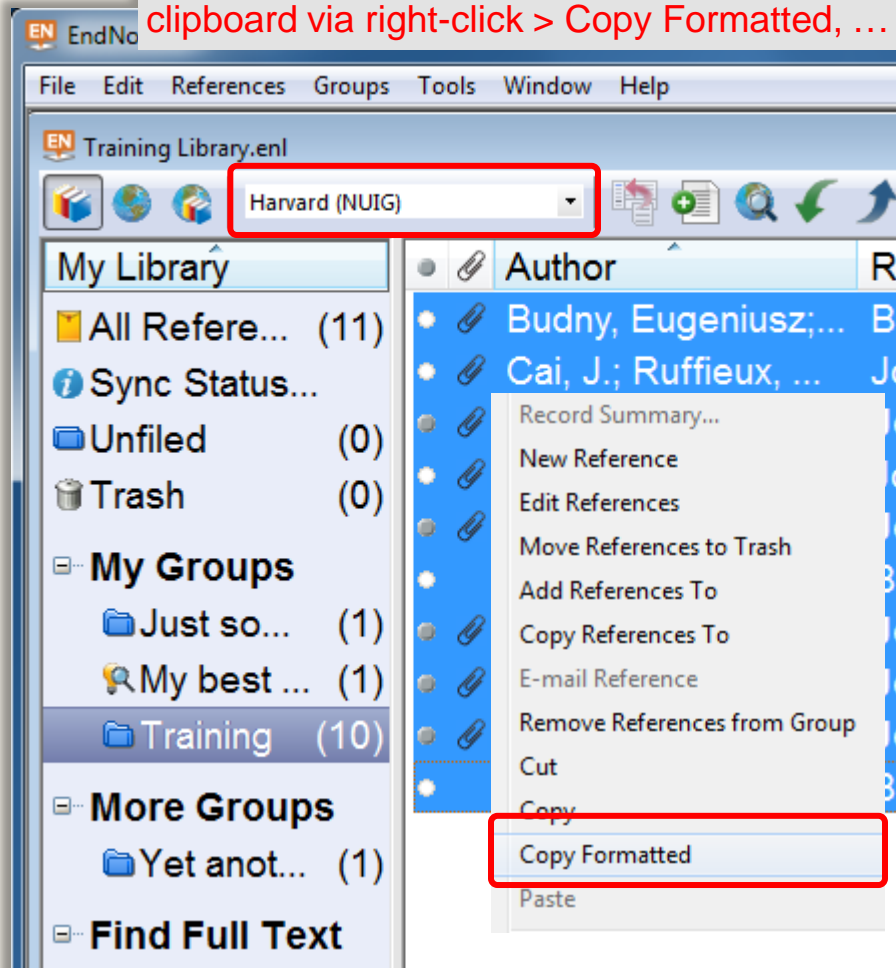
Author	Reference Type	Year
Budny, Eugeniusz;...	Book Section	20
Cai, J.; Ruffieux, ...	Journal Article	20
Clifford, Sarah E...	Journal Article	20
Einstein, Albert; In...	Book	19
Esner, J.; Cook, E...	Journal Article	20

Reference Preview Clifford-2009-Complexation of const

Clifford, S. E., Tiwow, V., Gendron, A., Maeder, M., Rossignoli, M., Lawrance, G. A., Turner, P., Blake, A. J. and Schroeder, M. (2009) Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine. *Australian journal of chemistry*, 62(10), pp. 1196-206 (Doi 10.1071/Ch09313).

Cite – Create a Quick Bibliography

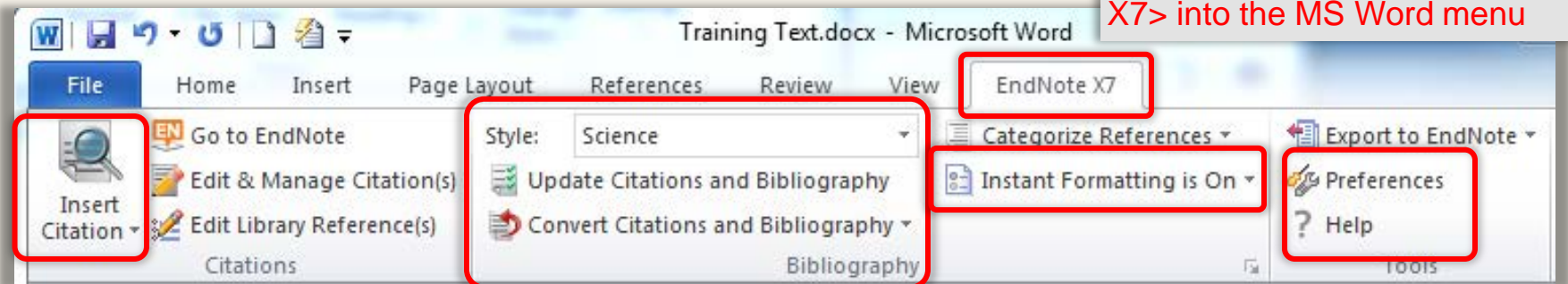
Using the current output style a bibliography with the selected references can be put into the clipboard via right-click > Copy Formatted, ...



...and can then be pasted with its formatting into a text document.

- Budny, E., Chłosta, M., Meyer, H. J. and Skibniewski, M. J. (2009) Construction Machinery. in Grote, K.-H. and Antonsson, E. K., (eds.) *Springer Handbook of Mechanical Engineering*. Springer Berlin Heidelberg. pp. 1149-1266.
- Cai, J., Ruffieux, P., Jaafar, R., Bieri, M., Braun, T., Blankenburg, S., Muoth, M., Seitsonen, A. P., Saleh, M., Feng, X., Mullen, K. and Fasel, R. (2010) Atomically precise bottom-up fabrication of graphene nanoribbons. *Nature*, 466(7305), pp. 470-473.
- Clifford, S. E., Tiwov, V., Gendron, A., Maeder, M., Rossignoli, M., Lawrance, G. A., Turner, P., Blake, A. J. and Schroeder, M. (2009) Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine. *Australian journal of chemistry*, 62(10), pp. 1196-1206.
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- Neyens, E. and Baeyens, J. (2003) A review of classic Fenton's peroxidation as an advanced oxidation technique. *Journal of Hazardous Materials*, 98(1-3), pp. 33-50.
- Pera-Titus, M., García-Molina, V., Baños, M. A., Giménez, J. and Esplugas, S. (2004) Degradation of chlorophenols by means of advanced oxidation processes: A general review. *Applied Catalysis B: Environmental*, 47(4), pp. 219-256.
- Schwarzenbach, R. P., Gschwend, P. M. and Imboden, D. M. (2003) *Environmental organic chemistry*, 2nd ed., Hoboken, New Jersey: Wiley-Interscience.

Cite-While-You-Write (MS Word Plugin)



- EN's Word plugin acts as an interface between EN and MS Word
- **Either use <Insert Citation> from within the Word document or drag'n drop selected citation(s) from EN to the desired position in the document**
- By default, EN activates <Instant Formatting>, ie citations and bibliography are automatically formatted (or updated every 30sec) according to the selected <Style>

Tip: Particularly if the document is becomes rather large it is better to use the unformatted citations (via <Convert Citations and Bibliography>) and turn of <Instant Formatting> during the writing process.

Cite-While-You-Write (MS Word)

Training Text.docx - Microsoft Word

File Home Insert Page Layout References Review View EndNote X7

Style: Science

Update Citations and Bibliography

Export to EndNote

Insert Citation

Edit Library Reference(s)

Convert Citations and Bibliography

Citations

Bibliography

Tools

Training Text

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis uma. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. (Esper, 2002 #23; Forgacs, 2004 #8; Freedman, 2007 #5)

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci. Aenean nec lorem. In porttitor. Donec laoreet nonummy augus. (Budny, 2009 #33)

Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem venenatis eleifend. Ut nonummy. Fusce aliquet pede non pede. Suspendisse dapibus lorem pellentesque magna. Integer nulla. (Pera-Titus, 2004 #7)

Bibliography

Drag'n drop selected references from Endnote to the desired positions in the document

Training Text.docx - Microsoft Word

File Home Insert Page Layout References Review View EndNote X7

Style: Science

Update Citations and Bibliography

Export to EndNote

Insert Citation

Edit Library Reference(s)

Convert Citations and Bibliography

Citations

Bibliography

Tools

Training Text

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis uma. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. (1-3)

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci. Aenean nec lorem. In porttitor. Donec laoreet nonummy augus. (4)

Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem venenatis eleifend. Ut nonummy. Fusce aliquet pede non pede. Suspendisse dapibus lorem pellentesque magna. Integer nulla. (5)

Bibliography

1. J. Esper, E. R. Cook, F. H. Schweingruber, Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability. *Science* 295, 2250-2253 (2002); published online EpubMar 22 (10.1126/science.1066208).
2. E. Forgacs, T. Cserháti, G. Oros, Removal of synthetic dyes from wastewaters: A review. *Environment International* 30, 953-971 (2004); published online EpubSep (10.1016/j.envint.2004.02.001).
3. D. A. Freedman, R. Pisan, R. Purves, *Statistics*. (W.W. Norton & Company, New York, ed. 4th, 2007), pp. 576.
4. E. Budny, M. Chłosta, H. J. Meyer, M. J. Skibniewski, in *Springer Handbook of Mechanical Engineering*, K.-H. Grote, E. K. Antonsson, Eds. (Springer Berlin Heidelberg, 2009), chap. 14, pp. 1149-1266.
5. M. Pera-Titus, V. García-Molina, M. A. Baños, J. Giménez, S. Esplugas, Degradation of chlorophenols by means of advanced oxidation processes: A general review. *Applied Catalysis B: Environmental* 47, 219-256 (2004); published online EpubFeb 20 (10.1016/j.apcatb.2003.09.010).

Page: 1 of 1 Words: 244 French (Switzerland) 95%

Training Library.enl

Science

My Library

- All References (11)
- Training Text.docx (5)
- Sync Status...
- Unfiled (0)
- Trash (0)
- My Groups
 - Just somethi... (1)
 - My best papers (1)
 - Training (10)

Author	Reference ...	Year
Budny, Eu...	Book Section	2009
Cai, J.; Ru...	Journal Arti...	2010
Clifford, S...	Journal Arti...	2009
Esper, J.; ...	Journal Arti...	2002
Forgacs, ...	Journal Arti...	2004
Freedman...	Book	2007
Milne, W. I...	Journal Ar...	2004
Neyens, E...	Journal Arti...	2004
Pera-Titus, ...	Journ...	2004
Schwarze...	Book	2003

Temperature Manage

Training Library.enl

Science

My Library

- All References (11)
- Training Text.docx (5)
- Sync Status...
- Unfiled (0)
- Trash (0)

Author	Reference ...	Year
Budny, Eu...	Book Section	2009
Esper, J.; ...	Journal Arti...	2002
Forgacs, ...	Journal Arti...	2004
Freedman...	Book	2007
Pera-Titus, ...	Journal Arti...	2004

EN creates a new group incl. the references associated with the docx-file

Cite-While-You-Write (MS Word)

The screenshot shows the Microsoft Word interface with the EndNote X7 ribbon active. The 'Style' dropdown is set to 'Science Copy' and is highlighted with a red box. The 'Update Citations and Bibliography' button is also highlighted with a red box. The document content includes a 'Training Text' section with placeholder text and a 'Bibliography' section with five references. The first reference is highlighted with a red box.

Training Text

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis uma. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. (1-3)

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci. Aenean nec lorem. In porttitor. Donec laoreet nonummy augue. (4)

Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem venenatis eleifend. Ut nonummy. Fusce aliquet pede non pede. Suspendisse dapibus lorem pellentesque magna. Integer nulla. (5)

Bibliography

1. J. Esper, E. R. Cook, F. H. Schweingruber, Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability. *Science* 295, 2250-2253 (2002). doi: 10.1126/science.1066208
2. E. Forgacs, T. Cserhádi, G. Oros, Removal of synthetic dyes from wastewaters: A review. *Environment International* 30, 953-971 (2004). doi: 10.1016/j.envint.2004.02.001
3. D. A. Freedman, R. Pisani, R. Purves, *Statistics*. (W.W. Norton & Company, New York, ed. 4th, 2007), pp. 576
4. E. Budny, M. Chłosta, H. J. Meyer, M. J. Skibniewski, in *Springer Handbook of Mechanical Engineering*, K.-H. Grote, E. K. Antonsson, Eds. (Springer Berlin Heidelberg, 2009), chap. 14, pp. 1149-1266.
5. M. Pera-Titus, V. García-Molina, M. A. Baños, J. Giménez, S. Esplugas, Degradation of chlorophenols by means of advanced oxidation processes: A general review. *Applied Catalysis B: Environmental* 47, 219-256 (2004). doi: 10.1016/j.apcatb.2003.09.010

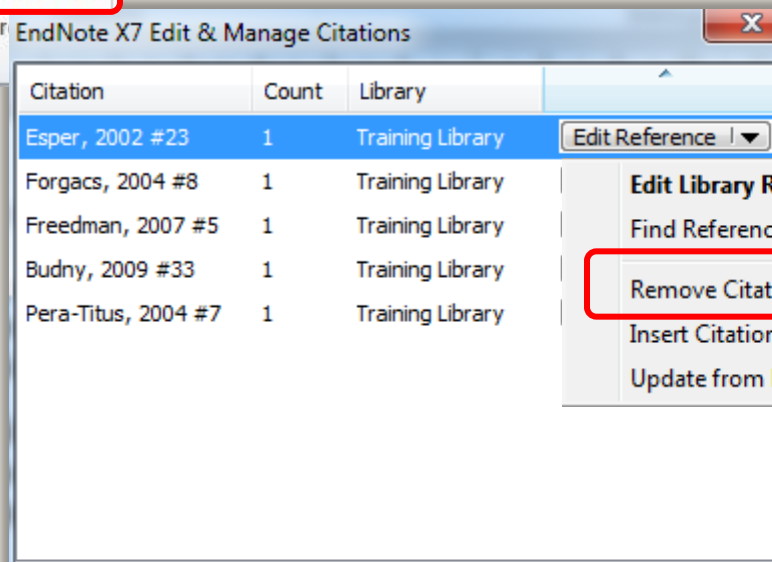
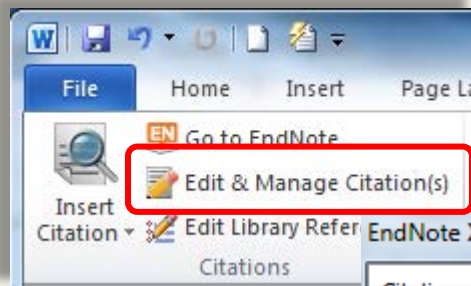
Tip: Double-check if EN's output is according to the journal's requirements or if there are any other issues (eg typos, missing or faulty field info)

Tip: If needed, edit the output style to your satisfaction, save it to another filename, and <Update Citations and Bibliography> using the altered style

Eg The style <Science> required minor adjustments in the reference type <Journal Article>

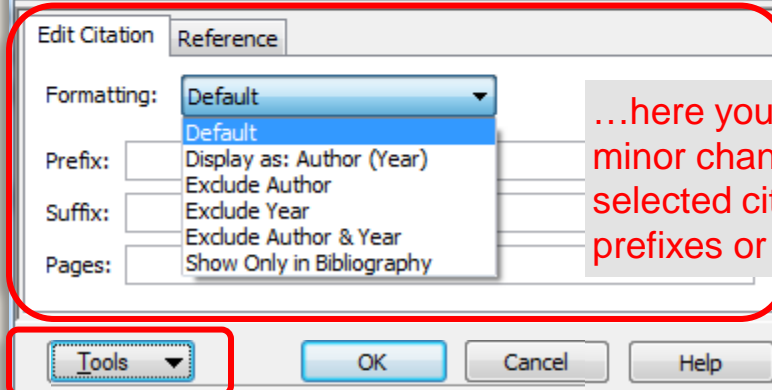
The screenshot shows the EndNote X7 Bibliography style editor. The 'Bibliography' tab is selected, and the 'Journal Article' template is highlighted with a red box. The template fields are: Author, Title, Journal Volume, Pages, (Year), doi, DOI.

Cite-While-You-Write (MS Word)



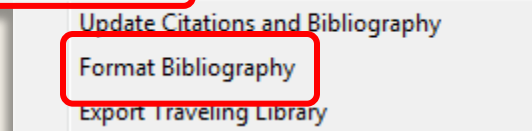
...preferably use this to remove a citation from the document

Tip: Use <Edit & Manage Citations> of EN's Word plugin to delete individual citations, to quickly adjust the output for one or more citation, and more.



...here you can introduce minor changes to the selected citations incl. prefixes or suffixes

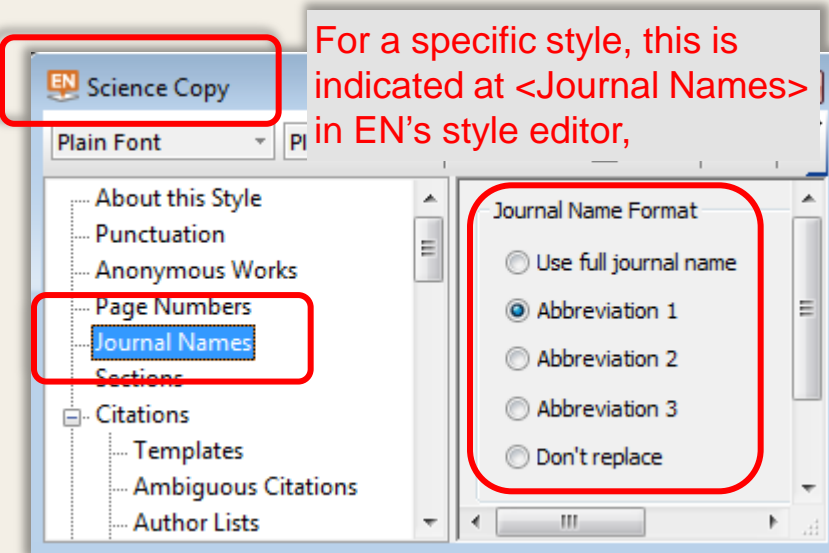
...here you can alter eg font, indent, line spacing etc of your bibliography



Cite – Using Journal Abbreviations

- Some journals require the journal title to be abbreviated in the bibliography

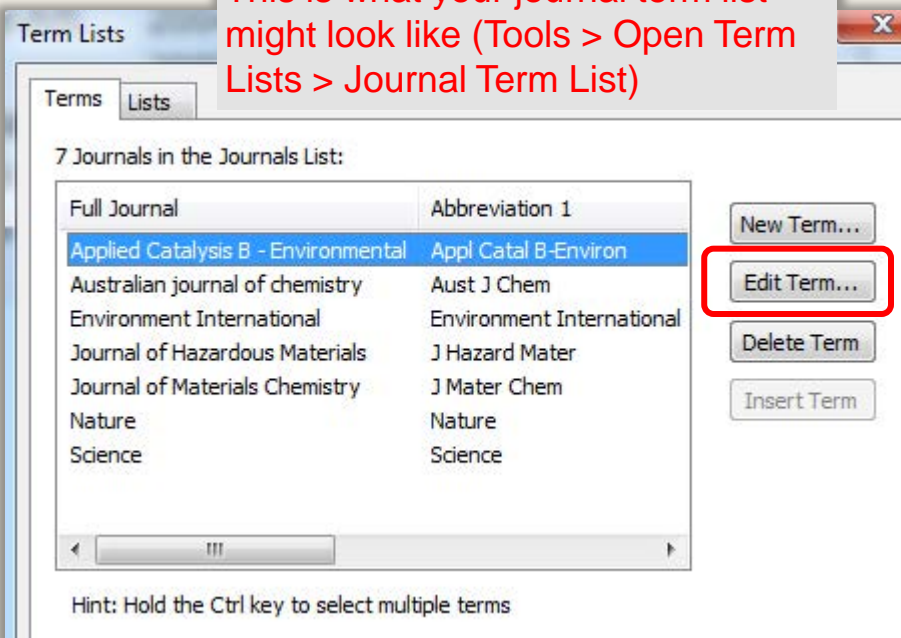
For a specific style, this is indicated at <Journal Names> in EN's style editor,



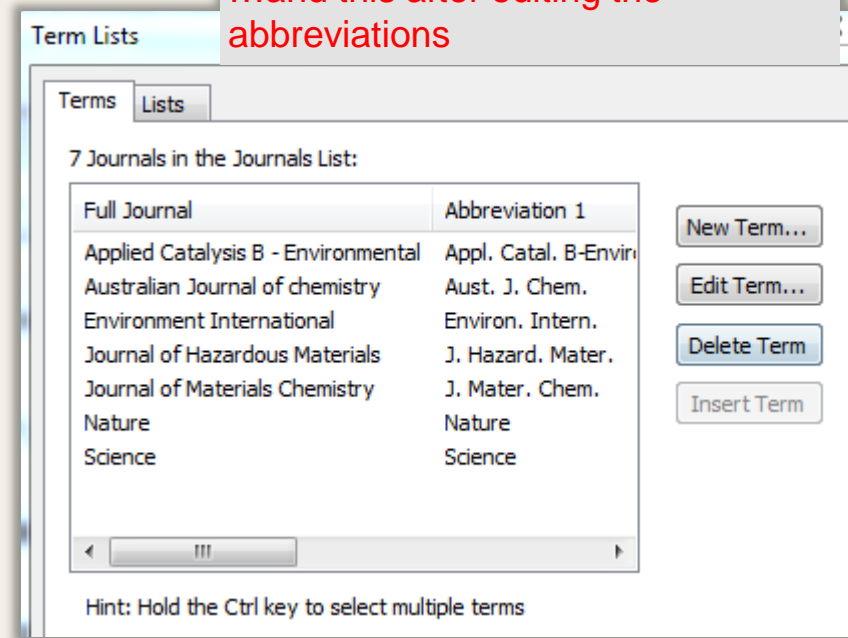
- The full title and up to 3 abbreviations for journals can be defined in a so called journal <Term List>
- Endnote
 - by default, copies the content of the reference field <Alternate Journal> as <Abbreviation 1> into a linked journal <term list>.
 - allows the import of built-in journal <term lists> (ASCII files)
 - allows to generate your own user defined journal <term list> (ASCII file)
- Method a) is the most straight forward one**
Method b) is particularly useful to save time with large amounts of citations
Method c) might require lots of manual editing

Cite – Using Journal Abbreviations (Method a)

This is what your journal term list might look like (Tools > Open Term Lists > Journal Term List)



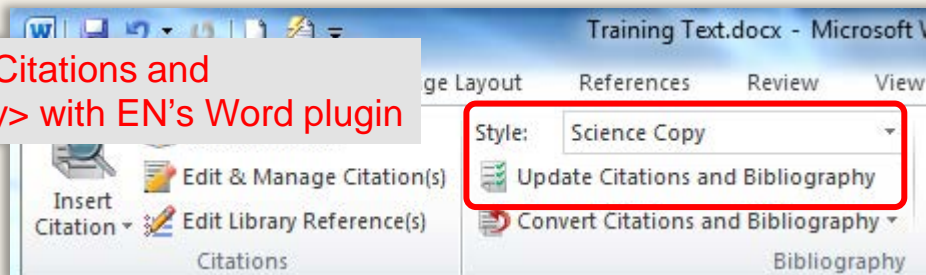
...and this after editing the abbreviations



- Tip: If you are having troubles finding 'correct' abbreviations see <http://www.lib4ri.ch/resources/journals.html#catalogues>
- Tip: Save your journal term list (*.txt) for future use, expansion or simply as a backup

Cite – Using Journal Abbreviations

...Update <Citations and Bibliography> with EN's Word plugin



...and observe the effect on the bibliography

Bibliography

1. J. Esper, E. R. Cook, F. H. Schweingruber, Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability. *Science* **295**, 2250-2253 (2002). doi: 10.1126/science.1066208
2. E. Forgacs, T. Cserhádi, G. Oros, Removal of synthetic dyes from wastewaters: A review. *Environ. Intern.* **30**, 953-971 (2004). doi: 10.1016/j.envint.2004.02.001
3. D. A. Freedman, R. Pisani, R. Purves, *Statistics*. (W.W. Norton & Company, New York, ed. 4th, 2007), pp. 576.
4. E. Budny, M. Chłosta, H. J. Meyer, M. J. Skibniewski, in *Springer Handbook of Mechanical Engineering*, K.-H. Grote, E. K. Antonsson, Eds. (Springer Berlin Heidelberg, 2009), chap. 14, pp. 1149-1266.
5. M. Pera-Titus, V. García-Molina, M. A. Baños, J. Giménez, S. Esplugas, Degradation of chlorophenols by means of advanced oxidation processes: A general review. *Appl. Catal. B-Environ.* **47**, 219-256 (2004). doi: 10.1016/j.apcatb.2003.09.010



Introduction to Endnote X7

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- Import metadata from PDFs
- Manually adding & altering references
- Find & attach full text PDFs

Organise

- Building groups
- Checking & Updating references
- Finding duplicates
- Searching references (incl. PDFs & annotations)
- Backing up your library

Cite

- Bibliographic output styles
- Cite-while-you-write (MS Word)
- Using journal abbreviations

Share & Sync

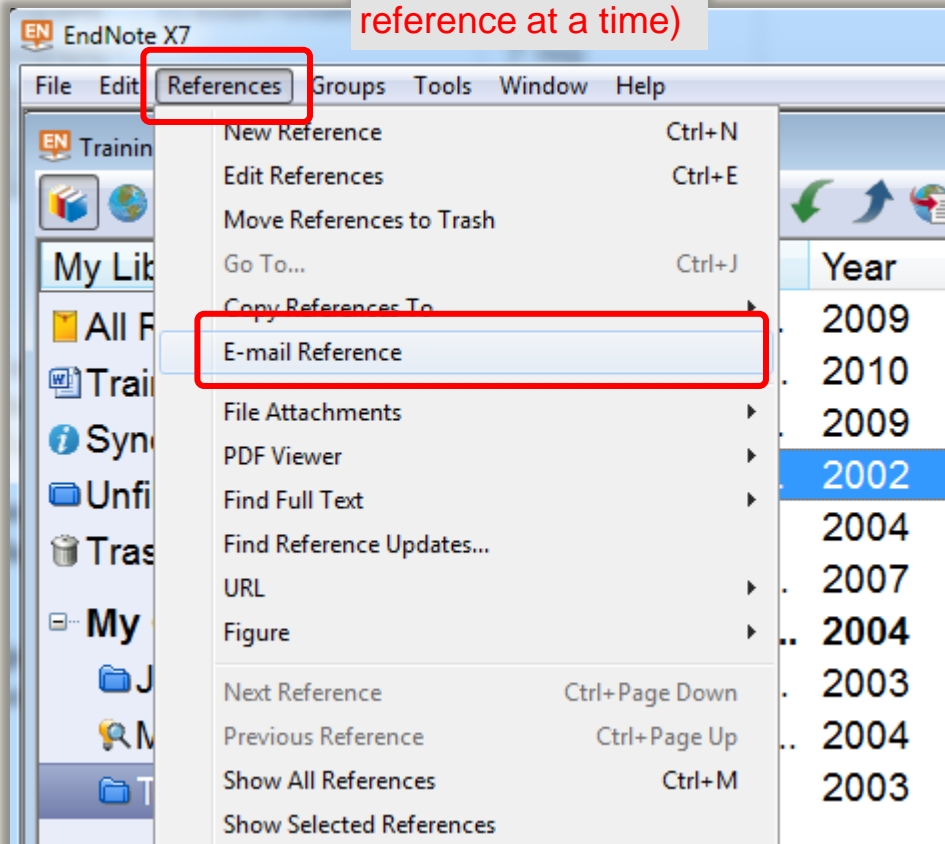
- Without EN Online Account
 - Share references via E-mail
 - Share travel library via Word plugin
 - Share library as a compressed library or via servers
- With EN Online Account
 - Sync between your devices
 - Share entire library (EN X7.2 only)
 - Share groups (EN Online only)

Concluding Info, Help & Useful Links

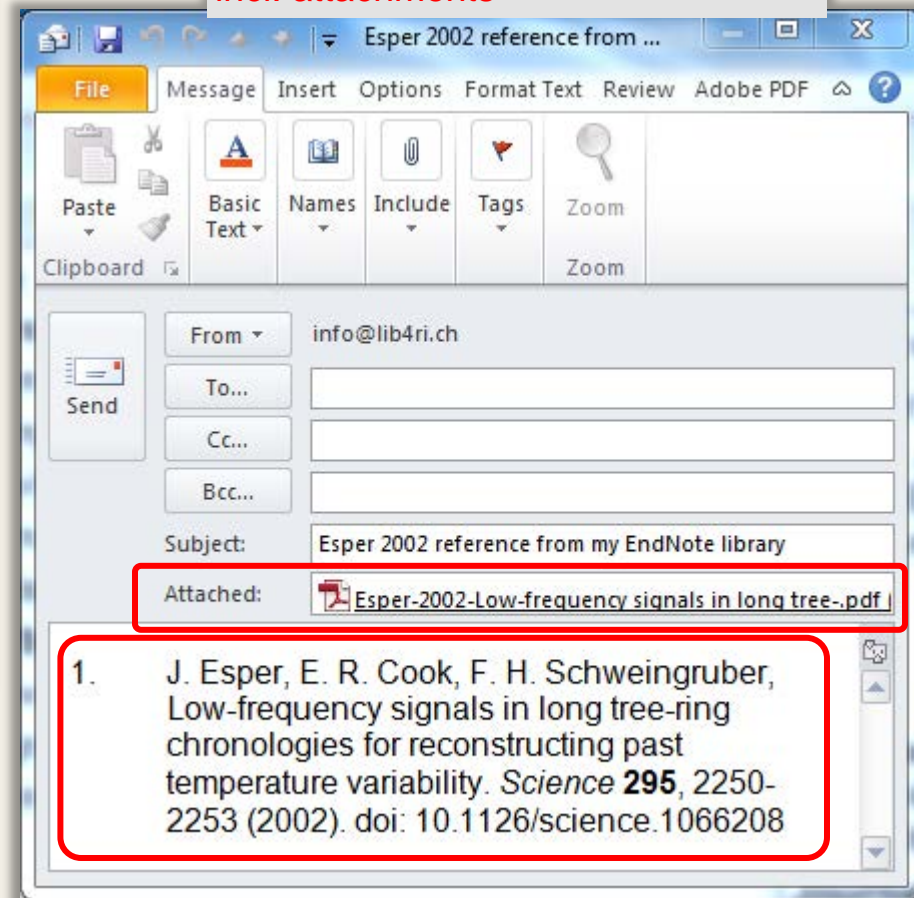
- Endnote can do more
- Is Endnote the right thing for me
- User Guides & Tutorials
- Support, Forum, FAQ, Blogs, Community, ...

Sharing without an EN Online Account

...via e-mail (one reference at a time)

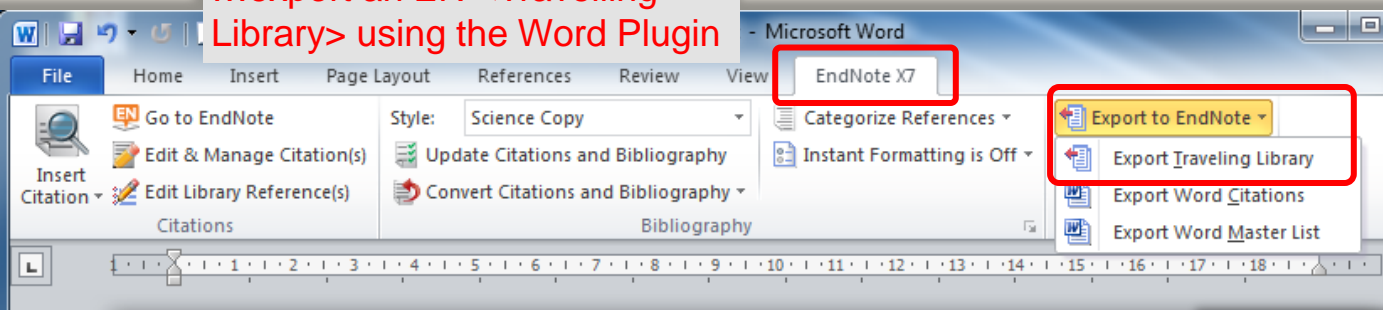


... formatted according to your style, incl. attachments



Sharing without an EN Online Account

...export an EN <Travelling Library> using the Word Plugin



Training Text

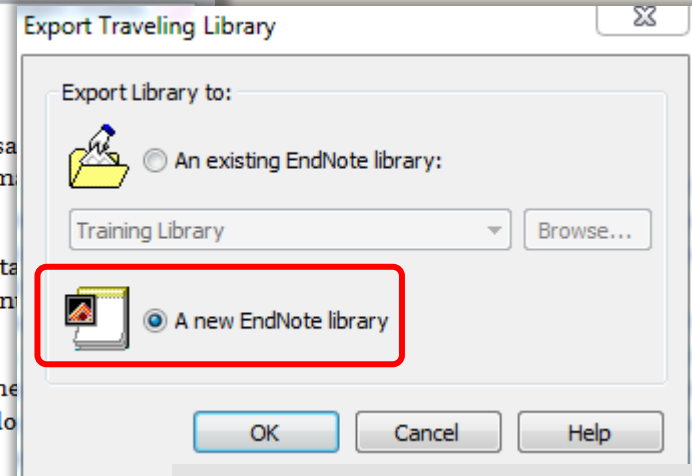
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna quis uma. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. (1-3)

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egesta pharetra nonummy pede. Mauris et orci. Aenean nec lorem. In porttitor. Donec laoreet non augue. (4)

Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget ne sem venenatis eleifend. Ut nonummy. Fusce aliquet pede non pede. Suspendisse dapibus lorem pellentesque magna. Integer nulla. (5)

Bibliography

1. J. Esper, E. R. Cook, F. H. Schweingruber, Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability. *Science* **295**, 2250-2253 (2002). doi: 10.1126/science.1066208
2. E. Forgacs, T. Cserhádi, G. Oros, Removal of synthetic dyes from wastewaters: A review. *Environ. Intern.* **30**, 953-971 (2004). doi: 10.1016/j.envint.2004.02.001
3. D. A. Freedman, R. Pisani, R. Purves, *Statistics*. (W.W. Norton & Company, New York, ed. 4th, 2007), pp. 576.
4. E. Budny, M. Chłosta, H. J. Meyer, M. J. Skibniewski, in *Springer Handbook of Mechanical Engineering*, K.-H. Grote, E. K. Antonsson, Eds. (Springer Berlin Heidelberg, 2009), chap. 14, pp. 1149-1266.
5. M. Pera-Titus, V. García-Molina, M. A. Baños, J. Giménez, S. Esplugas, Degradation of chlorophenols by means of advanced oxidation processes: A general review. *Appl. Catal. B-Environ.* **47**, 219-256 (2004). doi: 10.1016/j.apcatb.2003.09.010



...an EN library is created from the citations in the Word document (no attachments)

Sharing without an EN Online Account

- ✚ **Share your library (or groups thereof) by using EN's compress library feature**
 - The entire library or just groups incl. attachments can be compressed in one single file (refer to backup)
- ✚ **Share your library via an institutional server**
 - Put your library on a shared server
 - One person at a time has full access
 - Note that this can corrupt your library if the server has an outage
- ✚ **Don't share and sync your library via Dropbox and other Cloud services**
 - Endnote behaves like a time bomb and your library will eventually become corrupted. This is NOT recommended by Endnote at all!
- ✚ **Should your library get corrupted**
 - Endnote offers a repair tool with limited capabilities via Tools > Recover Library

Share & Sync Using an EN Online Account

Sign up for Endnote Online
at www.myendnoteweb.com

ENDNOTE®

Sign In or create an account

E-mail:

Password:

Login

☐ Keep me signed in



EndNote Preferences

Change Case
Display Fields
Display Fonts
Duplicates
Find Full Text
Folder Locations
Formatting
Libraries
PDF Handling
Read / Unread
Reference Types
Sorting
Spell Check
Sync
Temporary Citations
Term Lists
URLs & Links

Synchronize your data with your EndNote account. [Learn more](#)

Upgrade or create your two-year EndNote account to get the latest features and enable Sync.

Enable Sync

EndNote Account Credentials

E-mail Address:

Password:

Sync this EndNote Library

☒ Sync Automatically

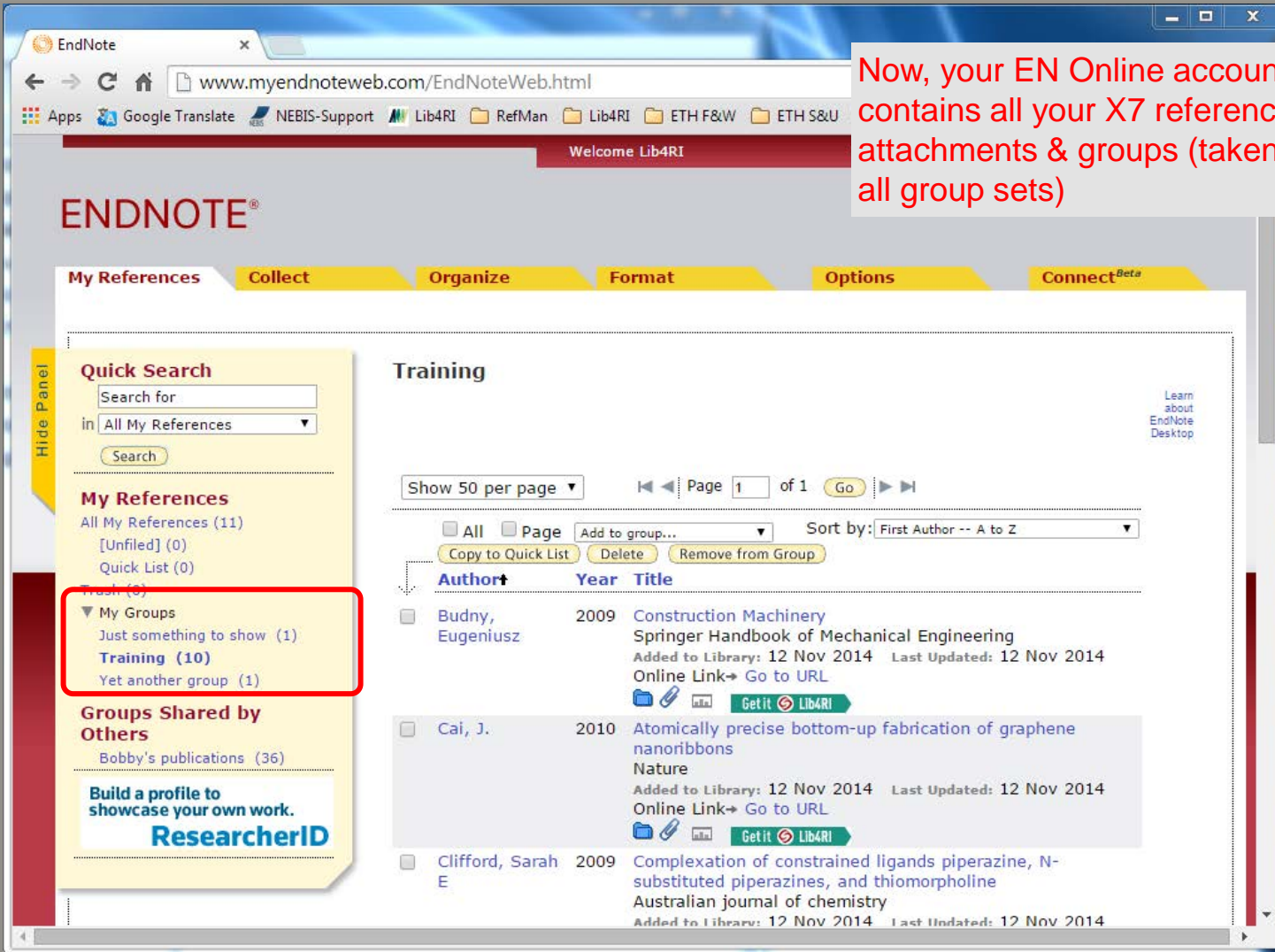
EndNote Defaults Revert Par...

Open your EN X7 library
and enter your details at
Edit > Preferences > Sync

If you always work with one and
the same library, you can activate
<Sync Automatically>, or else
manually sync via Tools > Sync

- Tip: Important - Backup your library prior to enabling Sync
- Tip: Important - Should you have an account with Thomson Reuters (alerts with Web of Science, Researcher ID, etc), use your existing credentials to sign into Endnote Online
- Tip: Only one single library can be synced (no smart groups)

Share & Sync Using an EN Online Account



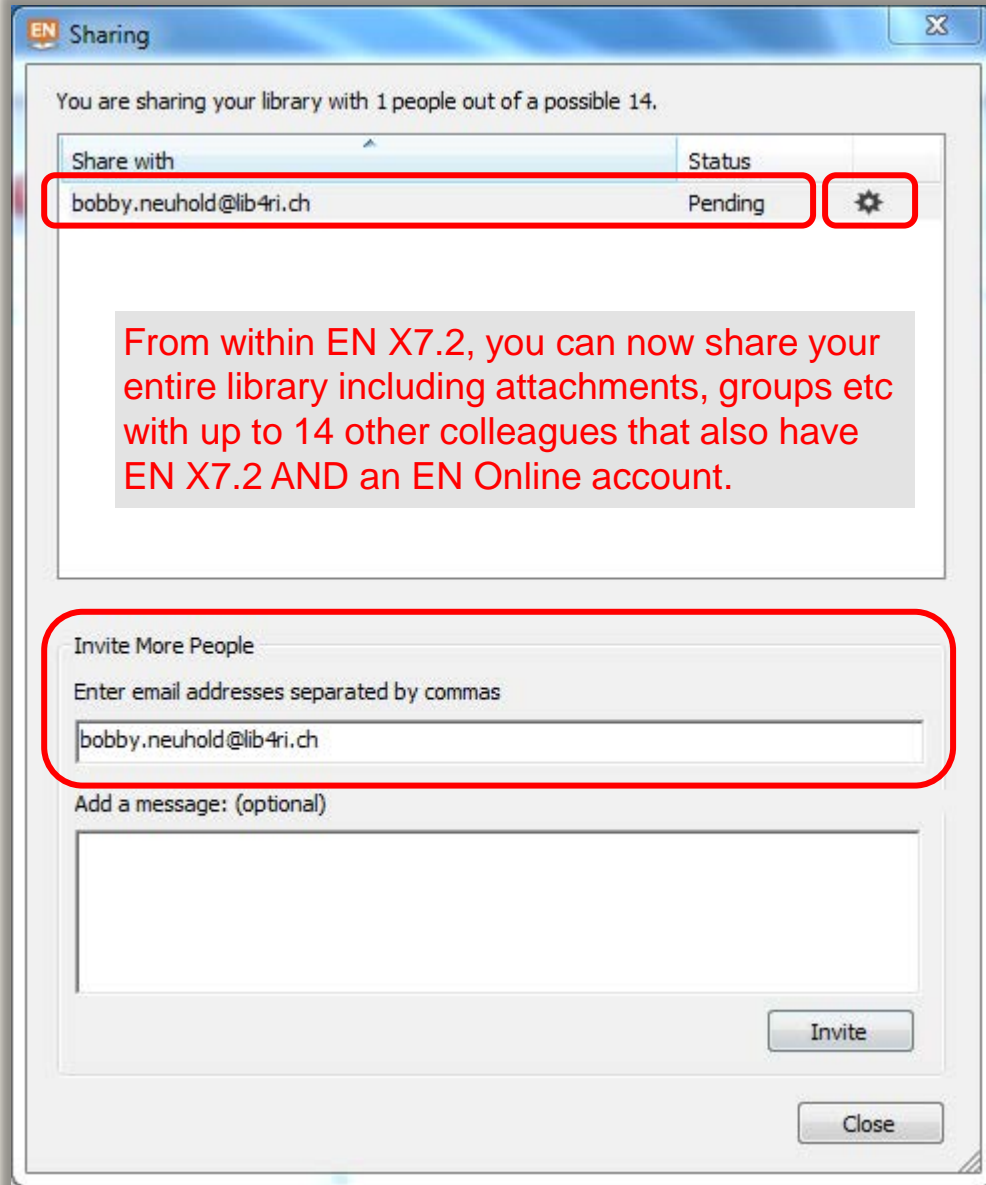
The screenshot shows the EndNote web interface in a browser window. The address bar displays www.myendnoteweb.com/EndNoteWeb.html. The page has a navigation bar with tabs: My References, Collect, Organize, Format, Options, and Connect^{Beta}. A sidebar on the left contains a 'Quick Search' section, 'My References' (11 items), and 'My Groups' (10 items, including 'Training'). A red box highlights the 'My Groups' section. The main content area shows a list of references under the heading 'Training'. The first reference is by Budny, Eugeniusz (2009) titled 'Construction Machinery Springer Handbook of Mechanical Engineering'. The second is by Cai, J. (2010) titled 'Atomically precise bottom-up fabrication of graphene nanoribbons Nature'. The third is by Clifford, Sarah E (2009) titled 'Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine Australian journal of chemistry'. A red text box in the top right corner states: 'Now, your EN Online account contains all your X7 references, attachments & groups (taken from all group sets)'.


Now, your EN Online account contains all your X7 references, attachments & groups (taken from all group sets)



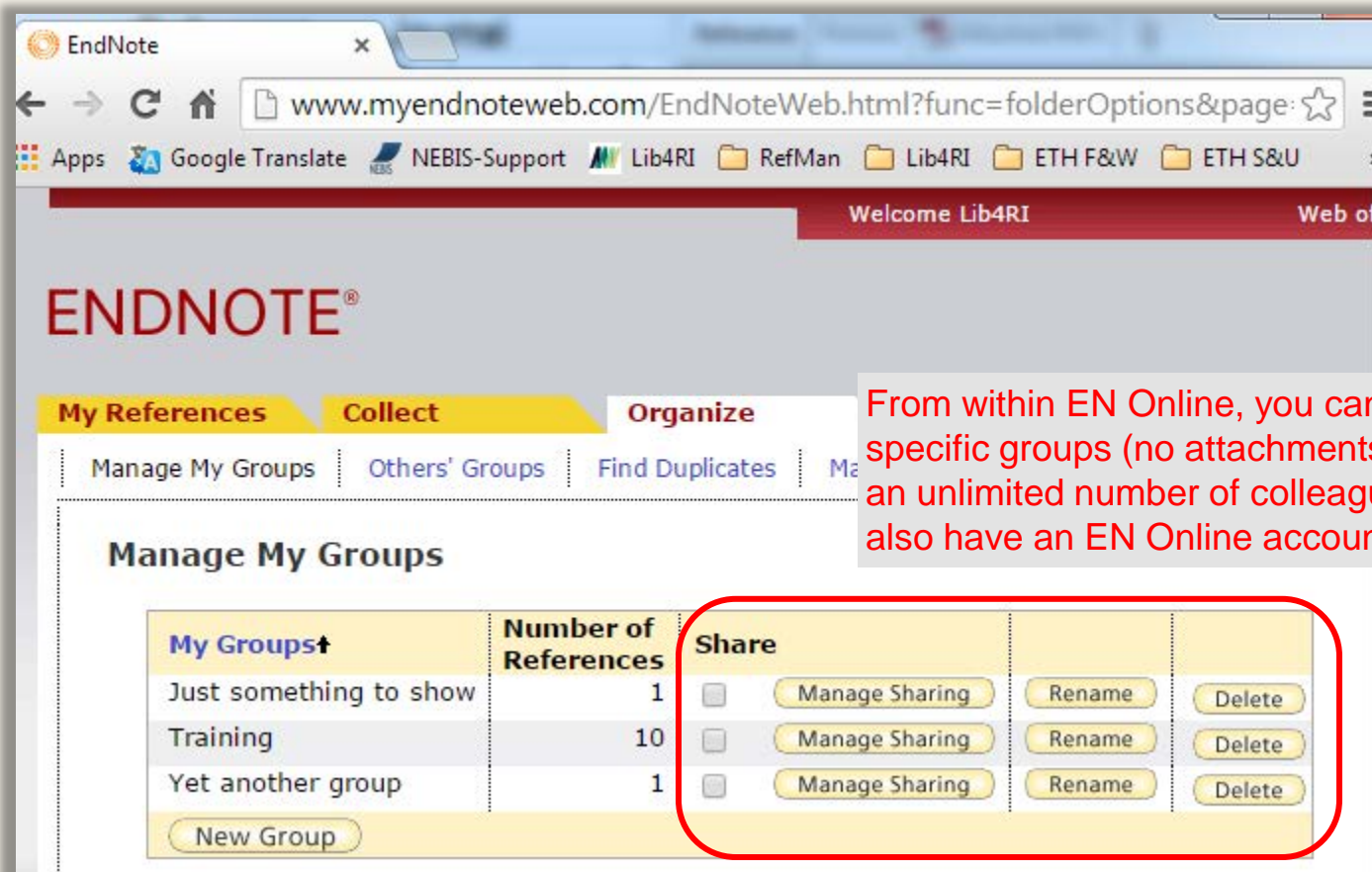
Tip: If you like to sync this library with another device (PC, Mac or iPad), create a new library on that device, then enable and start syncing therein (max 3 for one account)

Share & Sync Using an EN Online Account



- Tip: After the invitee accepts your invitation (via e-mail) his sharing status <Pending> changes to <Member>; you can revoke the membership at any time via 
- Tip: From within EN X7.2, the new member now has full access to your library via File > Open Shared Library. Note that all his changes will effect your (shared) library as well.

Share & Sync Using an EN Online Account



From within EN Online, you can share specific groups (no attachments) with an unlimited number of colleagues that also have an EN Online account.

My Groupst	Number of References	Share
Just something to show	1	<input type="checkbox"/> Manage Sharing Rename Delete
Training	10	<input type="checkbox"/> Manage Sharing Rename Delete
Yet another group	1	<input type="checkbox"/> Manage Sharing Rename Delete

[New Group](#)

Tip: Groups shared via EN Online are only accessible via EN Online (but can be exported to X7)

Tip: Endnote Online is a fully functional Reference Manager with limited functionality, particularly without a full EN X7 licence. Check Useful Links (below) to find more info on EN Online.

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- Cite-while-you-write (MS Word)
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 - Share library as a compressed library or via servers
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 - Sync between your devices
 - Share entire library (EN X7.2 only)
 - Share groups (EN Online only)

Concluding Info, Help & Useful Links

- Endnote can do more
- Is Endnote the right thing for me
- User Guides & Tutorials
- Support, Forum, FAQ, Blogs, Community, ...

Endnote can do more...

- Categorise bibliographies (eg for CVs)
- Cite within Powerpoint (plugin)
- Footnotes
- Built-in Word manuscript templates (for various journals)
- Handle figures and tables (for referencing in Word)
- Repair broken libraries
- ...

Be explorative

...but never
without a backup

Is Endnote the right thing for me?

➤ A quick comparison sheet (Endnote, Mendeley, Zotero) is in your documentation

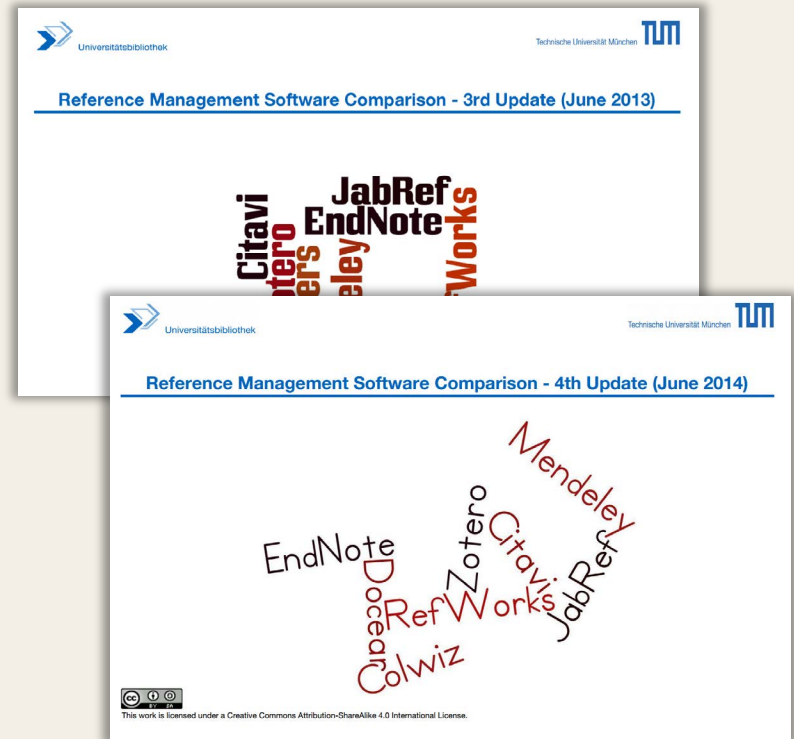
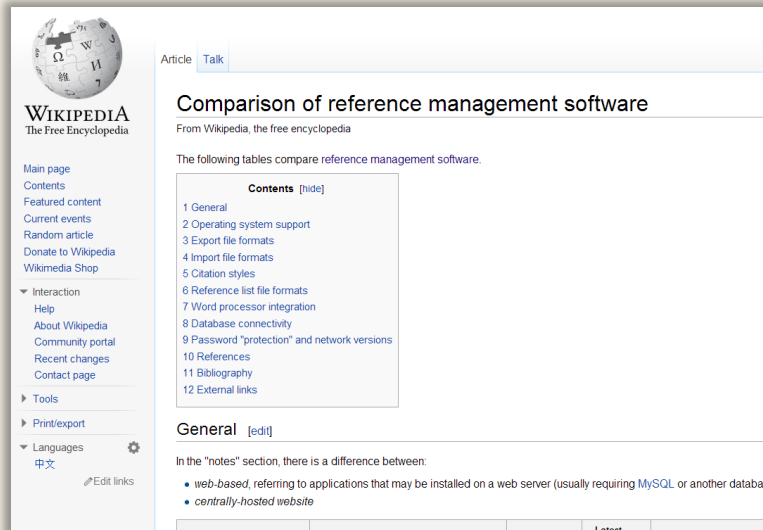
Quick Comparison Endnote, Mendeley, Zotero

More comparisons see: <http://www.lib4ri.com/2014/03/27/quick-comparison-endnote-mendeley-zotero/>

Bobby Newport, Lib4RI, 26 Feb 2014

General	Endnote	Mendeley	Zotero
Link	www.endnote.com	www.mendeley.com	www.zotero.org
Platform	Win, OSX, iOS (iPad only); Web	Win, OSX, Linux, iOS, Android (3rd party apps); Web	Win, OSX, Linux (Firefox extension or standalone with connectors to Chrome, Safari, Firefox, iOS & Android)
Language	English	English	English
License	Full license (\$300; client & Web); free license (Endnote WebBasic; reduced functions, particularly without Web or free license)	Free	Free
Online storage	2 GB free Endnote WebBasic; unlimited (full license)	100 MB free; 1 group, 3 members; unlimited MB & groups, from 100 MB/month & members	300 MB free, expandable by Dropbox; up to 25 GB (100 GB/year)
Sharing	via Endnote WebBasic account	via Mendeley account	via Zotero account
Max. datasets	Endnote library (incl. attachments) with max 14 others; groups (incl. attachments) with unlimited others via Endnote Web	unlimited	unlimited groups & members
Word processor	unlimited (30k with free Endnote WebBasic)	unlimited	unlimited
Data input / import / export	Word, Open Office, Pages	Word, Open Office, LaTeX (via BibTeX sync)	Word, Open Office
Manual input	yes	yes	yes
Import from database	yes	yes	yes
Import from web browser	yes (with capture via Endnote WebBasic)	yes	yes
Import from PDF	yes	yes	yes
Find full text group	Automatically (Web, DOI, PubMed, manually: OpenURL, http://dx.doi.org/10.1017/9780521875823.001)	yes (via web browser)	yes
Attach files	manually: OpenURL, http://dx.doi.org/10.1017/9780521875823.001	manually: Mendeley's crowd sourced database, OpenURL, http://dx.doi.org/10.1017/9780521875823.001	manually: Crossref, Google Scholar, OpenURL, http://dx.doi.org/10.1017/9780521875823.001
Import/export filter	Bibtex, RIS, Endnote XML, etc.	Bibtex, RIS, Endnote XML, etc.	Bibtex, RIS, Endnote XML, etc.
Handling	30	30	30
Search online database	yes (many connectors incl. Web of Science & MEDLINE)	only Mendeley's crowd sourced database (yes)	yes
Search library	yes (incl. PDFs and annotations)	yes (incl. PDFs)	yes (incl. PDFs)
Provide duplicates	yes	yes	yes
Provide duplicate removal	yes	yes	yes
Read / annotate PDFs	yes (built-in)	yes	yes
PDF organiser	yes (limited)	yes	yes
Sort references	yes (built-in)	yes	yes
Update metadata	yes (semi-automatic)	yes	yes
Organise in groups or folders	yes	yes	yes
Backup library	yes (compressed Endnote library)	yes (manually)	yes (manually)
Citation	yes	yes	yes
Style	+ 6000 (client), +3000 (Web), top 21 (without Web)	+6000 (client)	+6000 (client)
Style editor	yes	yes	yes
Integration with word processor	yes	yes	yes
Help	plugin (client & Web)	plugin	plugin
Manuals, Tutorials, Trainings, Support	http://www.endnote.com/support	http://www.mendeley.com/support	http://www.zotero.org/support
FAQ	http://www.endnote.com/support/faq	http://www.mendeley.com/support/faq	http://www.zotero.org/support/faq
Forum	http://www.endnote.com/support/forum	http://www.mendeley.com/support/forum	http://www.zotero.org/support/forum
Blog	http://www.endnote.com/support/blog	http://www.mendeley.com/support/blog	http://www.zotero.org/support/blog

Is Endnote the right thing for me?



Comprehensive comparisons

- [Wikipedia > Comparison of reference management software](http://mediatum.ub.tum.de/node?id=1231325)
- Digital Collection Management TU Munich
<http://mediatum.ub.tum.de/node?id=1231325> (2014)
<http://mediatum.ub.tum.de/node?id=1127557> (2013)

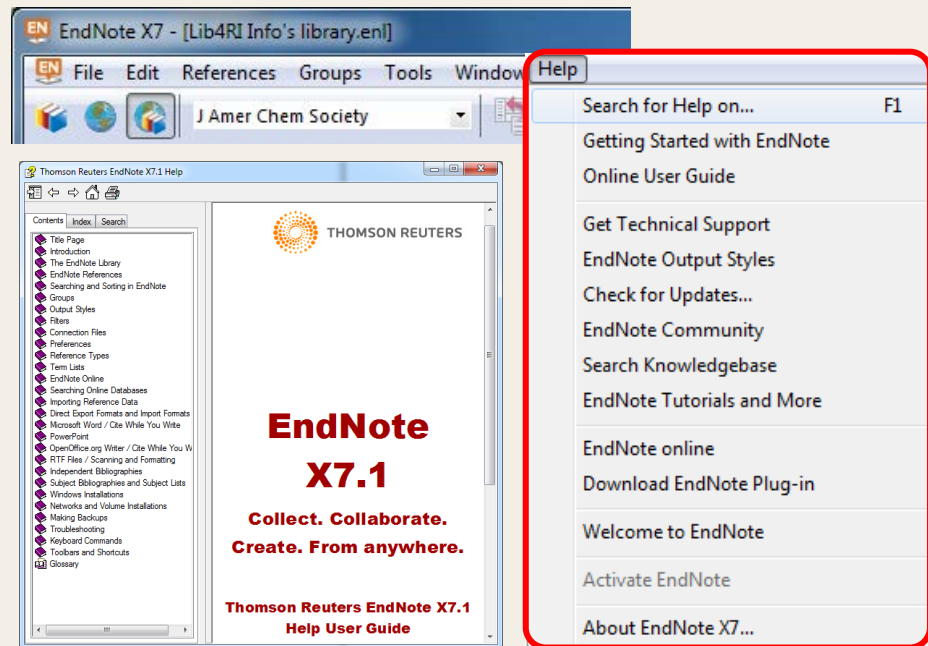


Talk to colleagues. Which software do they use and why !

Help, User Guides & Tutorials

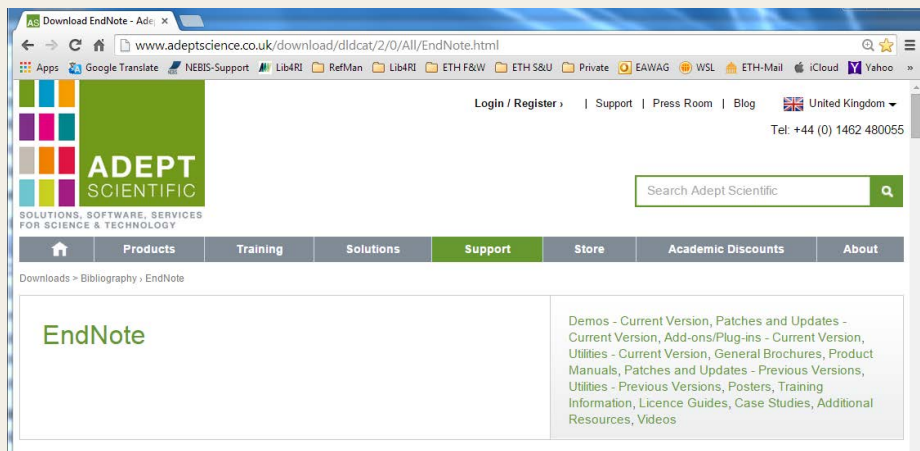
Via Endnote Help you have access to

- the built-in Endnote help, “F1” (PDF located in program folder)
- online training resources (tutorials, online user manual, webinars)
- technical support, knowledge base, community, programs updates, more styles, ...
- Also via www.endnote.com



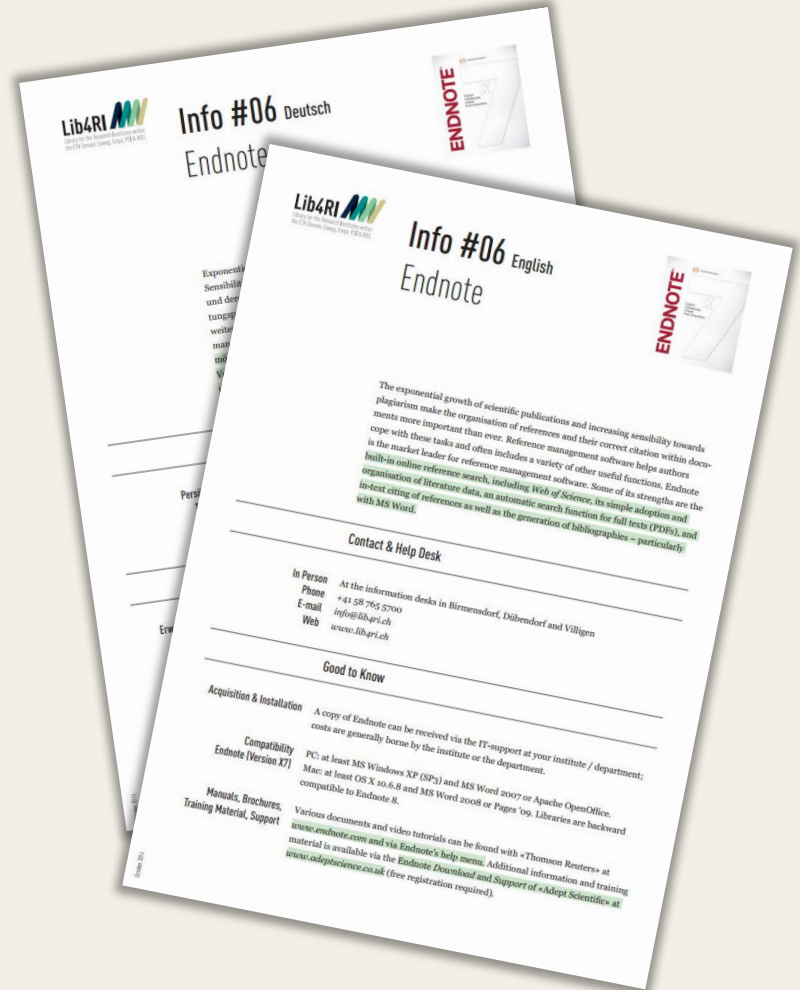
Adept Scientific's Endnote portal offers

- more training material incl. product manuals, quick reference & how to guides, case studies, ...
- links to the 30 day trial software
- note that some resources require a one-off email registration
- visit www.adeptscience.co.uk and navigate e.g. to > Support > Downloads > Endnote



Lib4RI Endnote Quick Guide

- Lib4RI's Info #06 covers relevant essentials to work with Endnote X7
- Find it in your documentation or download it via our website:
www.lib4ri.ch/services/lib4ri-info.html



Useful Links

Downloads

- <http://endnote.com> > Downloads
- <http://www.adeptscience.co.uk>
> Support > Download > Endnote

User Guides, Help, Tutorials, Training Videos & Classes

- <http://endnote.com> > Support
- <http://endnote.com> > Training (incl. Little-Endnote-How-To-Book)
- <http://www.myendnoteweb.com>
> Help
- <http://www.youtube.com/user/EndNoteTraining>
- <http://www.adeptscience.co.uk>
> Support > Downloads > Endnote

Support, Knowledge Base, Community, Forum, FAQ, Blogs

- <http://endnote.com> > Support
- <http://community.thomsonreuters.com>
- <http://www.myendnoteweb.com>
> Connect (registration required)
- <http://endnote.com> > Support
> Endnote FAQs
- <http://www.adeptscience.co.uk>
> Support > Knowledge Base
> Endnote
- <http://www.adeptscience.co.uk>
> Support > Knowledge Base
> Endnote Web
- <http://adeptscience.co.uk> > Support
> List Archives > Endnote Archive
- <http://endnote.com> > Blog

Thank you

Don't hesitate to ask for our
assistance

Stephanie Hofmann & Bobby Neuhold

Lib4RI - Library for Eawag, Empa, PSI & WSL

Überlandstrasse 133 • 8600 Dübendorf

tel +41 58 765 57 00

info@lib4ri.ch

www.lib4ri.ch